CA NOTARY ACADEMY

Complete course & assessment keys

Reviewer workbook | 20 modules, full lessons, activities, scenarios and 170 module questions

Review edition | October 28, 2026

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DRAFT - NOT SOS APPROVED

Prepared for review before a mailed initial application. This document does not establish vendor approval or authorize certificate issuance. See the lesson plan for the remaining submission items.

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Edition and reading instructions

Use the law intended for January 1, 2027 unless an exercise expressly names another date. AB 1828's replacement filing procedure is taught as operative January 1, 2028. Electronic signatures and seals do not by themselves authorize California remote practice.

This workbook contains the entire required candidate course. The separate optional Exam Center is not part of this 360-minute course. Section times include reading and the stated participation exercise. Attempt each exercise before reading the reviewer key. Existing source notes are retained; the amendment map identifies the new review. Operational identity/presence procedures and application gaps are described in the companion plan.

I-A: Eligibility for Appointment

Eligibility for appointment: build a defensible application plan

In 20 minutes, work through eligibility, education timing, application disclosures, and background review, then apply the rules in ten questions. Allow 12 minutes for the lesson and guided exercises and 8 minutes for the quiz and explanations.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 12, 2026: California Secretary of State Qualifications, Complete Approved Education, Notary FAQs, and 2026 Notary Public Handbook; Government Code §§ 8201-8201.2. https://www.sos.ca.gov/notary/qualifications · https://www.sos.ca.gov/notary/checklist/complete-approved-education · https://www.sos.ca.gov/notary/faqs. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Separate personal eligibility from completed process steps (2 minutes)

Government Code § 8201 establishes age, legal California residence, education, and examination requirements. Section 8201.1 requires fingerprints for background review.

Begin an application plan with two questions: do I meet the personal requirements, and what evidence shows that I have completed each required step? An applicant must be at least 18 and a legal California resident. Working in California does not, by itself, establish California residence. Neither an employer's recommendation nor years of handling documents substitutes for a requirement. The ordinary resident-applicant path is the focus of this lesson; an unusual appointment situation should be checked against the official instructions rather than inferred from a workplace arrangement.

Now separate those personal facts from education, the state examination, and background clearance. A person may satisfy one requirement while another remains unresolved. Think of an application file with separate items to verify, rather than a single readiness score. Strong practice results do not compensate for an unresolved residence requirement. Likewise, meeting age and residence requirements does not establish that the applicant has passed the examination.

Guided exercise: Avery is 19, lives legally in California, and has completed an approved course. Avery's employer says the certificate is enough to begin notarizing. Write down the facts that are established, the requirements still unverified, and the evidence you would request next. The useful response names the missing steps; simply saying Avery is eligible leaves the employer's misunderstanding unresolved.

Checkpoint: Exercise debrief: age, residence, and education are established; exam passage, background clearance, and the later commission activation steps are not.

Checkpoint: A course certificate documents education. It does not confer authority to perform a notarial act.

2. Choose education using status and dates (2 minutes)

A first-time applicant takes an approved six-hour course. For reappointment, investigate the current commission status and prior education before selecting the shorter course. The three-hour refresher is available to a current California notary who has completed an approved six-hour course at least once and meets the reappointment timing requirements. Completing a refresher before expiration is not enough if the applicant delays the application and examination until afterward. A six-hour approved course can also satisfy the education requirement for an otherwise refresher-eligible applicant.

Build a timeline with the current commission's expiration date, planned course completion, and the examination at which the completed application will be submitted. Check that the proposed dates actually satisfy the refresher rules. Reserving an exam seat is different from taking the exam and submitting the application. If the existing commission expires before the required steps are completed, another approved six-hour course is required. Prior experience does not preserve access to the refresher indefinitely.

Guided exercise: Morgan and Riley both previously completed six-hour education. Morgan's commission remains active through December; Morgan completes the refresher and takes the examination with a completed application in October. Riley's commission expired last week, and Riley wants to take a refresher tomorrow. Identify which fact changes the education decision, then explain why the applicants' similar work experience does not produce the same result.

2027 clarification - AB 1977 sections 1-2: Section 8201(b)(2) expressly requires satisfactory completion of the written examination as well as the three-hour refresher for a currently commissioned reappointment applicant who previously completed the approved six-hour course. The refresher is not an exam exemption. Section 8201.2 now also provides SOS review of the separate two-hour online-notarization course referenced by section 8231.3. This six-hour application seeks no approval for that separate course and grants no online-notarization authority.

Checkpoint: Morgan meets the stated refresher conditions; Riley needs the six-hour course because the commission has expired.

Checkpoint: Before paying for education, verify the provider on the Secretary of State's approved-vendor list.

3. Read the two clocks on education proof (2 minutes)

Keep your Proof of Completion with the application documents and examine its issuance date. Education proof has a two-year validity period. For a six-hour certificate, failure to pass the examination before the certificate expires means another approved six-hour course is needed. A certificate is therefore a dated credential, not a permanent exemption from education. Passing a practice quiz does not extend it.

For a refresher applicant, there are two relevant clocks: the certificate's validity and the current commission's expiration. The two-year life printed on a refresher certificate does not allow its use after the commission expires. The applicant must apply and take the examination before both expirations. A retake also needs attention: if an applicant fails and the commission expires before the retake, the applicant must complete six-hour education even if the refresher certificate is recent.

Guided exercise: Sam completes a refresher in February. The current commission expires in June. Sam fails an examination in May and finds a retake date in July. Without relying on how recently the class was completed, identify the controlling change. Then revise Sam's plan. In your own planning notes, record exact dates rather than phrases such as 'this summer.' Allow time for a possible retake; a plan that works only if every step succeeds on the first attempt is fragile.

Checkpoint: Sam needs an approved six-hour course for the July retake because the commission will have expired.

Checkpoint: Certificate validity and continued refresher eligibility are separate checks; satisfy both.

4. Complete disclosures instead of predicting the outcome (2 minutes)

Read the current application carefully before signing it. The Secretary of State requires disclosure of convictions and arrests for which trial is pending. Convictions dismissed under Penal Code sections 1203.4 or 1203.4a must still be disclosed. A dismissal is not a reason to silently remove an item from the notary application. If the record or the question is unclear, seek guidance from the Secretary of State before signing rather than guessing or relying on a friend's experience.

Disclosure and the appointment decision are different issues. Reporting an event supplies information for review; it does not mean the course provider can predict acceptance or denial. Conversely, a person who believes an old event will not be disqualifying still must answer the application accurately. Failure to disclose can itself lead to a denial recommendation. Do not treat the background check as a replacement for your own complete answers.

Guided exercise: Taylor recalls a dismissed conviction but does not know the section under which it was dismissed. A colleague suggests answering no because the fingerprint check will find anything important. Identify both problems with that advice. Draft a better next step that resolves the uncertainty before the application is signed. Your answer should focus on obtaining accurate information and official guidance, not deciding whether Taylor deserves a commission.

Checkpoint: Debrief: the applicant must disclose as required; background review does not excuse omissions.

Checkpoint: Clarify uncertain records with the appropriate record authority and application questions with the Secretary of State before signing.

5. Understand what background review establishes (2 minutes)

Fingerprint submission allows the required background investigation. Follow the Secretary of State's notary-specific Live Scan instructions, including the correct request form. Do not assume fingerprints taken for a different job satisfy this application. A receipt showing that fingerprints were submitted establishes submission, not a favorable decision. Similarly, an examination pass notice is evidence of exam performance, not evidence that every appointment requirement has been resolved.

The Secretary of State evaluates the application and background information. Certain convictions can affect eligibility, and official disciplinary guidance explains the review standards. A training provider should not promise that every old conviction is harmless or that any conviction automatically ends the application. Questions requiring an individual determination belong with the appointing authority.

Guided exercise: Casey has a course certificate, an examination pass notice, and a Live Scan receipt. Sort those documents by the specific fact each supports. What statement would overreach the evidence? 'My fingerprints were submitted' is supported by the receipt; 'my background was cleared' requires more. This habit transfers to notarial work: describe what the evidence actually establishes and avoid filling gaps with confidence. Keep copies of your application-related records so that follow-up questions can be answered consistently.

Checkpoint: Education completion, exam passage, fingerprint submission, and background clearance are different milestones.

Checkpoint: Use the official application process to resolve an individual background question; course completion cannot guarantee appointment.

6. Assemble a plan that survives a delay (2 minutes)

Finish by making a short application plan with four columns: requirement, evidence, next action, and deadline. Enter personal eligibility, the approved education path, the certificate date, examination and application arrangements, and fingerprint/background processing. For a reappointment applicant, put the current commission expiration at the top of the page where it can be compared with every planned action. Mark assumptions that still need verification. An exam reservation belongs under arrangements; it does not belong under completed examination.

Now stress-test the plan. If the first exam attempt fails, does a retake still fit before the relevant dates? If the application needs clarification, who will answer the question? If the current commission expires while the next appointment is pending, what work must stop? A pending application does not extend the previous commission. Early planning reduces the chance that a delay leaves you without authority to serve.

Before the quiz, write a two-sentence explanation to a prospective employer: what has already been completed, and what still must happen before notarial work begins? Part B explains the commission start date and timely county filing in detail. Here, the objective is to keep appointment preparation separate from authorization to act. Spend the remaining lesson time on the case below, then answer the ten questions without consulting the examples. Read the feedback even for correct answers and identify the fact that rules out the closest alternative.

Checkpoint: Your plan should identify an evidence gap and a specific next action, not just say 'finish the process.'

Checkpoint: Case exercise: change one date in your plan and explain whether the education path or authority to work changes.

Module scenario: One application, three unresolved assumptions

Lee's commission expires in August. Lee completed a refresher in July but scheduled the exam for September. Lee also has a conviction dismissed under Penal Code section 1203.4 and assumes fingerprints from a previous employer will cover the application.

Identify the education correction, the disclosure obligation, and the fingerprinting step before Lee submits the application.

Review point: The September exam is after commission expiration, so Lee needs approved six-hour education.

Review point: The dismissed conviction must be disclosed; Lee should resolve any application uncertainty with the Secretary of State before signing.

Review point: Lee must follow the notary-specific fingerprint instructions and cannot assume an employer's prior submission satisfies them.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

Module quiz and correction | 8 minutes

I-A-v2-Q1

Nina, 24, lives in Nevada and commutes to a California office. Which additional fact is essential before she can use the ordinary resident-applicant path?

A. Whether the employer will pay the bond premium

B. Whether she establishes legal California residence

C. Whether she has handled documents for four years

D. Whether her employer already employs a notary

Answer: B. A California workplace does not establish legal California residence. Employer support and experience do not substitute for this personal requirement.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q2

An applicant has completed approved education and passed the examination. Fingerprints have not been submitted. What is the accurate assessment?

A. Only the purchase of a seal remains

B. The exam result waives background review

C. The course provider can authorize temporary service

D. The fingerprint-based background requirement remains unresolved

Answer: D. Exam passage establishes one requirement. Background processing is still required before appointment; no course provider can supply temporary notarial authority.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q3

Which applicant meets the stated conditions for three-hour refresher education?

A. A current notary with prior approved six-hour education who completes the refresher, applies, and takes the exam before expiration

B. A former notary whose commission expired yesterday and who previously completed six-hour education

C. A first-time applicant with extensive legal-office experience

D. A current notary who takes a refresher now but first applies and takes the exam after expiration

Answer: A. The active commission, prior six-hour education, and timely course, application, and exam steps must align. Experience, prior service, or course completion alone is insufficient.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q4

Omar's refresher certificate was issued one month ago, but his commission expired before his first exam date. What education does he need now?

A. No additional education while the certificate is under two years old

B. A second three-hour refresher to update the certificate date

C. An approved six-hour course

D. Only a provider letter confirming previous service

Answer: C. A recent refresher certificate does not preserve eligibility after commission expiration. Six-hour education is required; repeating the refresher does not fix the status problem.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q5

A six-hour Proof of Completion has expired, and the applicant has not passed the state exam. Which plan addresses the education issue?

A. Attach the expired proof with a newly dated application

B. Complete another approved six-hour course

C. Ask the exam administrator to extend the old certificate

D. Replace the proof with practice-test results

Answer: B. The applicant must complete another approved six-hour course. A fresh application date, an assumed extension, or practice results cannot renew the certificate.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q6

An applicant's conviction was dismissed under Penal Code section 1203.4. What should the applicant do?

A. Omit it because dismissal removes the disclosure requirement

B. Disclose it only if the exam administrator asks

C. Wait for the fingerprint report before deciding whether to mention it

D. Disclose it on the application as required

Answer: D. This type of dismissed conviction must still be disclosed. Neither silence until asked nor reliance on the fingerprint report satisfies the applicant's disclosure duty.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q7

A notary fails an exam before commission expiration; the only available retake is after expiration. The notary used refresher education. What changes?

A. Six-hour education is required for the retake after expiration

B. The original application extends the commission through the retake

C. The refresher remains usable because the first attempt was timely

D. Only the examination fee changes

Answer: A. The retake occurs after the current commission expires, so six-hour education is required. An earlier attempt does not extend either the commission or refresher eligibility.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q8

A Live Scan provider gives Priya a receipt. What does this document support without assuming a later result?

A. The Secretary of State has approved her appointment

B. She may begin work while the commission is mailed

C. Her fingerprints were submitted for processing

D. Her application disclosures were found complete

Answer: C. Submission is not clearance. The receipt does not establish appointment, authorization to act, or the accuracy of the application.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-v2-Q9

A current notary qualifies for the refresher but prefers an approved six-hour course. How should that choice be assessed?

A. It is permitted only after the commission expires

B. It is permitted and satisfies the education requirement

C. It requires a waiver from the exam administrator

D. It changes the applicant into a first-time applicant

Answer: B. Approved six-hour education can satisfy the education requirement for reappointment. Choosing the longer course does not require expiration or change the applicant's prior commission history.

Source: Government Code §§ 8201-8201.2; SOS Qualifications and Complete Approved Education

I-A-2027-Q10

In 2027, Elena holds a current commission, previously completed the approved six-hour course and completes a qualifying three-hour refresher. She tells Omar this eliminates the reappointment exam. What is correct?

A. Omar may use Elena's certificate

B. Only first-time applicants take an exam

C. Elena must also satisfactorily complete the written examination

D. The refresher authorizes remote notarization

Answer: C. Section 8201(b)(2) expressly includes satisfactory completion of the written examination. A course completion is not a commission or online authorization.

Source: AB 1977 secs. 1-2; GC 8201(b)(2), 8201.2.

I-B: Commission

Commission: know when and where your authority begins

Use the commission dates, county filing requirements, and geographic limits to decide whether a proposed appointment may proceed. Allow 5 minutes for instruction and 5 minutes for five questions and feedback.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources: Government Code §§ 8200, 8204, 8212-8213; 2026 Notary Public Handbook; https://www.sos.ca.gov/notary/checklist/bond. Verified September 12, 2026; draft pending approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Read the commission, then verify activation (2 minutes)

Government Code § 8204 sets a four-year term. Sections 8212-8213 require the $15,000 official bond and timely oath-and-bond filing.

When the commission packet arrives, read the stated commencement and expiration dates. The term runs from the date on the commission, not from the day the envelope arrives or the date of your first customer appointment. Prepare to file the oath of office and official bond with the county clerk for the county of your principal place of business. The required bond amount is $15,000; that is the bond's face amount, not necessarily the price charged to buy it.

The oath and bond must be filed no later than 30 calendar days after the commencement date. They may be submitted before commencement, but an early filing does not move the commission start date forward. The commission does not take effect without timely filing. A packet, a paid bond invoice, or an appointment with the clerk is not evidence that filing has been completed. Coordinate with the county promptly and retain filing evidence.

Exercise: a commission starts October 1; the packet arrives September 20 and county filing is completed September 25. A customer asks for service September 28. Explain why early preparation does not authorize that September act. Then change the filing date to October 10: could the notary act October 5? Identify the missing condition in each version.

Checkpoint: September 28 precedes the term; October 5 precedes filing in the second version. Neither proposed act is authorized.

Checkpoint: A filing deadline is an outside limit, not a grace period for notarizing before filing.

2. Distinguish filing county, location, and protection (2 minutes)

County filing connects the commission to the principal place of business, but California authority is statewide. A notary whose oath is filed in Alameda County may perform an authorized act in San Diego County. The certificate venue identifies where the act actually occurs. It does not automatically repeat the county on the seal or the location printed on the document. Statewide authority ends at the state boundary: a California commission does not authorize an act performed in Nevada simply because the document will be used in California.

The official bond protects people injured by covered notarial misconduct; it is not personal liability insurance for the notary. A surety's payment does not necessarily relieve the notary of repayment responsibility. Optional errors-and-omissions insurance and the statutory bond serve different purposes. Purchasing insurance does not replace the bond required for filing.

Exercise: your principal office is in Alameda County, the signer appears before you in San Diego County, and the property is in Nevada. Name the filing county and the certificate venue. Then decide what changes if the signer asks you to travel into Nevada instead. Focus on the place of the act rather than the property's location.

Filing timeline - AB 1828 sections 7-8: During 2027, the existing section 8213 remains operative: timely file the oath and bond with the county clerk; the clerk transmits the oath certification to SOS and delivers the bond to the county recorder for recording. Pay applicable county filing and recording charges; obtain the current county quote rather than assume a fixed statewide total. Section 7 repeals this version on January 1, 2028. The replacement in section 8 becomes operative on January 1, 2028, retaining the 30-day activation requirement but changing to clerk retention of the bond, a filing fee determined under section 54985, and one certified bond copy as proof. Under that replacement the clerk keeps the oath for 10 years following commission expiration and the bond for 10 years from filing. Those are different clocks. Do not use the 2028 procedure for a 2027 filing.

Checkpoint: File for the principal business county; use San Diego as venue for the described California act.

Checkpoint: Travel into Nevada places the proposed act outside the authority of a California commission.

3. Plan for a missed deadline or a gap (1 minutes)

If timely oath-and-bond filing is missed, do not begin notarizing or assume late filing activates the original commission. The Secretary of State directs applicants to reapply. Use its current instructions to determine the necessary application and fingerprint steps. A renewal application also does not extend the old commission. When the prior term ends, service must stop until the next commission is effective.

Before accepting a first appointment, verify the term has begun, timely filing is complete, and the required working tools are ready. Put those facts in a short readiness note. That note is more useful than saying 'my commission arrived,' because it records the conditions that establish authority.

Checkpoint: Case below: decide whether the notary is ready to act before considering customer urgency.

Module scenario: The packet arrived, but filing has not happened

Dev's commission term began five days ago. Dev has the packet and purchased a bond, but the county has not filed the oath and bond. A longtime client asks for a notarization today.

Which completed step is missing, and does being inside the 30-day window change the answer?

Review point: The oath and bond have not been filed, so Dev cannot perform the act.

Review point: The 30-day window is the filing deadline; it is not permission to act before activation.

Source: Government Code §§ 8200, 8204, 8212-8213; SOS File Notary Public Oath & Bond

Module quiz and correction | 5 minutes

I-B-v2-Q1

A commission began six days ago. The notary bought a bond but has not filed the oath and bond. May the notary serve a client today?

A. Yes, because the term has started

B. Yes, because the filing deadline has not passed

C. No, timely oath-and-bond filing must be completed first

D. No, every new notary must wait the full 30 days

Answer: C. The term's start and timely filing are both necessary. The filing window is neither a grace period for acts nor a mandatory waiting period after filing.

Source: Government Code §§ 8200, 8204, 8212-8213; SOS File Notary Public Oath & Bond

I-B-v2-Q2

A commission starts November 1. Which event determines the beginning of its four-year term?

A. The November 1 date stated in the commission

B. The date the packet is delivered

C. The date the first notarial fee is collected

D. The date the notary purchases a seal

Answer: A. The stated commission date controls the term. Delivery, purchases, and first use do not restart or extend the four-year period.

Source: Government Code §§ 8200, 8204, 8212-8213; SOS File Notary Public Oath & Bond

I-B-v2-Q3

An Alameda-filed notary performs an act in San Diego for a document concerning Nevada property. Which venue county is appropriate?

A. Alameda, matching the oath filing

B. The Nevada county where the property is located

C. Either Alameda or San Diego

D. San Diego, where the act takes place

Answer: D. Venue follows the actual location of the act. Neither the filing county nor the property's location changes that fact.

Source: Government Code §§ 8200, 8204, 8212-8213; SOS File Notary Public Oath & Bond

I-B-v2-Q4

An applicant purchases errors-and-omissions insurance and asks to omit the $15,000 bond. What is the correct response?

A. Insurance replaces the bond if coverage exceeds $15,000

B. The statutory bond remains required despite optional insurance

C. The bond is required only for notaries charging fees

D. The bond can be deferred until the first claim

Answer: B. The required official bond and optional insurance are different protections. Insurance coverage, free service, or the absence of claims does not remove the filing requirement.

Source: Government Code §§ 8200, 8204, 8212-8213; SOS File Notary Public Oath & Bond

I-B-2027-Q5

Priya files her oath and bond in March 2027. Luis says AB 1828 already eliminated recording and she can skip the existing procedure. Which answer follows the enacted transition?

A. Luis is correct because the bill passed in 2026

B. The 2027 filing still follows the existing recording process; the replacement is operative January 1, 2028

C. The 30-day activation rule was abolished

D. A bond invoice alone activates the commission

Answer: B. AB 1828 sec. 7 keeps the existing section 8213 through 2027; sec. 8 expressly delays the replacement until January 1, 2028. The 30-day requirement remains in both versions.

Source: AB 1828, Ch. 275, Stats. 2026, secs. 7-8; GC 8213.

I-C: Managing a Commission

Managing a commission: respond to changes without losing control

Build a response plan for address and name changes, official requests, employer pressure, and the end of service. Allow 12 minutes for instruction and case work and 8 minutes for ten questions and feedback.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources: Government Code §§ 8202.5, 8202.7-8202.8, 8205-8209, 8213-8213.6; 2026 Notary Public Handbook; https://www.sos.ca.gov/notary/faqs. Verified September 12, 2026; draft pending approval.

1. Turn changes into dated tasks (2 minutes)

Commission management begins with recognizing the event that starts a deadline. A residence change and a business address change each require notice to the Secretary of State within 30 days. Updating a driver's license, forwarding postal mail, or telling payroll does not update the notary record. Use a letter or the official address-change form and send it by certified mail or another means of physical delivery that provides a receipt. Retain a copy and delivery evidence.

Record the actual change date, the deadline, the action required, and evidence of completion. If two addresses change on different days, do not assume the later move restarts the earlier deadline. A practical log might read: residence changed May 3; business changed May 18; notices prepared separately against each event. Check the current form for the information needed and avoid leaving the state to infer which address changed.

Exercise: Ren moves home but keeps the same office. Ren assumes no report is required because the seal does not show a home address. Identify the flaw: reporting duties are determined by the statute, not by which details appear on the stamp.

Checkpoint: Residence changes matter even when the business address and seal remain the same.

Checkpoint: Keep proof of the notice rather than relying on a memory of mailing it.

2. Moving the business across county lines (2 minutes)

A move of the principal business from one California county to another requires the address notice. It does not require a county transfer of the oath and bond. Your commission already authorizes acts throughout California. You may choose to file a new oath and bond in the new county, but that optional county procedure should not be confused with the mandatory notice to the Secretary of State.

Consider a move from Sacramento County to Yolo County. Continuing to serve in California does not depend on transferring the filing solely because of the move. However, statewide authority is no excuse for leaving the business address unchanged in state records. If you elect to transfer, follow the official filing and seal-authorization process for the new county. Do not simply alter the seal yourself.

Exercise: compare 'I must notify the Secretary of State' with 'I must transfer my commission before serving anyone in the new county.' The first identifies the required response to an address change; the second incorrectly treats county filing as a geographic limit. Write a one-sentence explanation for an office manager who believes the move requires all notarial work to stop until a transfer.

Checkpoint: Required: timely business-address notice with receipt-producing physical delivery.

Checkpoint: Optional: county transfer; follow its filing and seal procedures if chosen.

3. Changing the commissioned name in the right order (3 minutes)

Government Code §§ 8213 and 8213.6 govern the amended commission, oath and bond amendment, and replacement seal.

A legal name change does not automatically revise the commission. Submit a Name Change Application to the Secretary of State. After approval, an amended commission is issued. Within 30 days of its issuance, file a new oath of office and an amendment to the bond with the county clerk. The amended commission takes effect when those items are filed. This is the transition point to distinguish from the date of the personal name change or the date the application was mailed.

Within 30 days after that filing, obtain a seal reflecting the new name. Once the amended oath and bond are filed, the old-name commission and stamp may no longer be used. The period allowed to obtain the replacement seal does not authorize use of the old one in the meantime. Plan procurement so that you do not accept an appointment that requires a seal you do not yet have. If the amended oath and bond are not filed within the required period, the name change becomes void, the commission reverts to the previous name, and another name-change application is needed.

Guided exercise: Alex's amended commission is issued June 3. Alex files the new oath and bond amendment June 12 but has not received the new seal. A client arrives June 13 and suggests using the old stamp with a handwritten name correction. Identify the operative event and explain why the suggested workaround fails. Then draw two arrows: issuance to filing, and filing to obtaining the seal. Label each 30-day period with its own starting event. The durations look alike, but their triggers are different.

Checkpoint: June 12 filing makes the amended commission effective; the old stamp cannot be used June 13.

Checkpoint: Do not combine the issuance-to-filing deadline with the filing-to-new-seal deadline.

4. Respond to the state with the records requested (2 minutes)

The Secretary of State can request information about official acts in writing. Government Code section 8205 requires a response within 30 days of receipt. It also requires certified copies of journal records when requested in writing by the Secretary of State. A closed transaction, a former employer, or a busy work schedule does not eliminate the duty to respond. Read the request carefully, record receipt, identify the requested records, and prepare an accurate response tied to the journal.

Do not recreate an entry from memory to make the file look complete. Preserve the actual record and address any discrepancy truthfully. Keep a copy of what you send and evidence of the response. Different types of requests can have different rules, so do not borrow a response period from an unrelated customer request or from vendor-course administration. Here, the trigger is receipt of the Secretary of State's written request about official acts.

Exercise: a request arrives after you change jobs and asks about a notarization performed for the former employer. Decide who is responsible for the response and where the reliable facts should come from. The employer's involvement in the transaction does not transfer your official recordkeeping obligations.

Checkpoint: Calendar the 30-day response from receipt of the written information request.

Checkpoint: Use retained official records and furnish requested certified journal copies; do not manufacture missing facts.

5. Separate workplace agreements from official control (2 minutes)

A private employer may pay for the bond and supplies and enter an agreement concerning fees or services during working hours under Government Code sections 8202.7 and 8202.8. These arrangements do not transfer the commission to the business. The journal and seal remain under the notary's required control. If employment ends, an employer's payment for supplies does not give it the right to keep those official tools. Store them securely so coworkers cannot use them when you are absent.

Public-employee notaries have separate statutory rules, including fee handling under section 8202.5. Do not assume a private workplace agreement answers a public employee's fee question. In either setting, management cannot authorize a false certificate, skipped identity steps, or shared use of a seal. An employment instruction and a lawful notarial instruction can conflict; your duty is to perform the official act lawfully.

Exercise: a supervisor offers to keep your journal in an unlocked office cabinet so the next notary can continue using it when you leave. Explain the control problem and propose a practical transition: retain your official journal and seal, and have the employer arrange its future service through a properly commissioned notary with that person's own tools.

Checkpoint: An employer's supply payment does not create ownership of the notary's official journal or seal.

Checkpoint: An agreement about workplace fees or availability cannot waive statutory duties.

6. End service deliberately (1 minutes)

If you resign, notify the Secretary of State through the official resignation process, deliver your notarial records and papers to the county clerk where the current oath is filed within 30 days, and destroy the seal. For expiration without obtaining reappointment within 30 days, section 8209 governs delivery of records and papers; follow the official guidance for that situation. The record-delivery rule does not create a 30-day extension of authority to notarize.

Make an end-of-service checklist before the last day: stop accepting acts beyond your authority, identify the county that receives the records, preserve delivery evidence, and prevent further use of the seal. A coworker cannot inherit a commission, journal, or stamp. Work through the combined case below to distinguish events that require notice from events that change which tools can be used.

Checkpoint: Resignation and expiration require deliberate handling of records and seal, not an informal handoff to an employer.

Module scenario: A new office and an amended commission

Jules moves the business from Sacramento to Yolo County. A week later, Jules files an amended oath and bond after a name change. The replacement seal has not arrived. The employer says the county move is the only issue and asks Jules to keep using the old seal.

Separate the required address action, the optional county action, and the effect of the name-change filing.

Review point: Notify the Secretary of State of the business-address change within 30 days using the required delivery method.

Review point: A county transfer is optional; statewide authority already covers Yolo County.

Review point: The amended filing ends use of the old-name stamp. Obtain the new seal before performing acts that require it.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

Module quiz and correction | 8 minutes

I-C-v2-Q1

A notary moves home but keeps the same office. Which action is required?

A. Wait until renewal because the business address is unchanged

B. Report only to the county clerk

C. Replace the seal because the residence changed

D. Notify the Secretary of State within 30 days using the required physical delivery method

Answer: D. A residence change independently triggers notice. Neither an unchanged office nor county contact replaces notice to the Secretary of State; a home move alone does not require a replacement seal.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q2

A principal business moves from one California county to another. Which statement correctly distinguishes the two procedures?

A. State address notice is required; county transfer is optional

B. County transfer is required; state address notice is optional

C. Both can wait until the next commission

D. Both are unnecessary because authority is statewide

Answer: A. Statewide authority makes county transfer optional, but does not eliminate the required address notice.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q3

Which event starts the 30-day period for filing the new oath and bond amendment for a name change?

A. The date payroll adopts the new name

B. The date the name-change application is mailed

C. The date the amended commission is issued

D. The date the replacement stamp arrives

Answer: C. The amended commission's issuance starts the filing deadline. Payroll, application mailing, and stamp delivery are not the statutory trigger.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q4

The amended oath and bond were filed yesterday. The new seal has not arrived. May the old-name seal be used for an act requiring a seal?

A. Yes, for 30 days after filing

B. No, the old-name stamp may no longer be used

C. Yes, if the new name is handwritten beside it

D. Yes, if the client approves the mismatch

Answer: B. Filing makes the amended commission effective and ends use of the former stamp. The time allowed to obtain a new seal is not permission to keep using the old one.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q5

A notary receives a written Secretary of State request about an official act performed at a former job. What controls the response?

A. The former employer decides whether to respond

B. The duty ended when employment ended

C. The deadline runs from the original notarization date

D. The notary must respond within 30 days of receipt

Answer: D. The notary remains responsible, and receipt of the written request starts the response period. Changing jobs or finishing the transaction does not end that duty.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q6

An employer paid for a notary's journal and seal. On the notary's last day, the manager demands both. What should happen?

A. The notary retains control of the official journal and seal

B. The employer keeps them because it paid

C. The journal stays, but the notary keeps the seal

D. Both are transferred to the replacement employee

Answer: A. Payment does not transfer control of official tools. Neither splitting them nor handing them to another employee satisfies the notary's duties.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q7

An address-change form is complete. Which delivery plan follows the stated requirement?

A. Send it only to the employer's HR portal

B. Keep it with the journal until renewal

C. Send it to the Secretary of State by certified mail or another physical method providing a receipt

D. Tell the next exam proctor verbally

Answer: C. The notice must reach the proper state office through the required physical delivery method. Internal records and verbal notice elsewhere do not fulfill it.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q8

An amended commission was issued, but the new oath and bond amendment were not filed within 30 days. What follows?

A. The new name remains effective without filing

B. The name change becomes void and another name-change application is needed

C. The original commission automatically receives another four-year term

D. Buying the new seal completes the missing filing

Answer: B. The name change becomes void and the commission reverts to the former name. Neither a new seal nor an assumed term extension cures the missed filing.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q9

A notary resigns before the term ends. Which plan properly addresses the official tools and records?

A. Keep everything available for occasional unpaid acts

B. Give the seal and journal to a coworker with a commission

C. Return everything to the course provider

D. Notify the Secretary of State, deliver records to the proper county clerk within 30 days, and destroy the seal

Answer: D. Resignation calls for the official notice, county record delivery, and seal destruction. Free service and transfer to another notary do not preserve or transfer authority.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

I-C-v2-Q10

A private employer has an agreement about work-hour notarial fees. The manager asks the notary to skip required identity checks for a familiar customer. What does the agreement permit?

A. Fee handling within the law, without waiving identity requirements

B. Skipping checks if no notarial fee is charged

C. Replacing the notary's judgment with the manager's approval

D. Using the employer's customer records instead of the required process in every case

Answer: A. A workplace fee arrangement does not waive notarial duties. Free service, management approval, and customer familiarity do not authorize bypassing the required process.

Source: Government Code §§ 8205-8209, 8213-8213.6; SOS Notary FAQs

II-A: Tools to Function as a Notary Public

Tools: create a record you can defend

Build and audit a complete journal entry, protect your seal, and respond correctly to records requests. 25 minutes of reading and case work, followed by an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Set up a secure working kit (3 minutes)

A journal is an official record of acts, not a customer contact list. Keep one active sequential journal at a time. Separate books for office and mobile appointments break that sequence. Maintain the journal and seal in a locked, secured area under your direct and exclusive control. An employer may pay for them, but coworkers must not gain routine access through a shared key or common drawer. Copies of signed documents do not replace the journal.

Before an appointment, check that the active journal, usable commissioned seal, appropriate certificate forms, and fingerprint supplies are ready. Match the name and expiration on the seal to the commission. The $15,000 official bond is a separate qualification requirement, not a replacement for these tools or insurance protecting you from every claim. If a tool is unavailable, address the missing requirement before starting an act that depends on it.

Participation exercise

Spend two minutes sketching an office-to-mobile storage plan. You share a desk, coworkers have keys to its drawers, and you work at two locations. Identify who can access each tool and how you will keep a single sequence.

Reviewer debrief

Use one active journal across both locations and secured storage to which only you have access. A shared locked drawer does not provide exclusive control. Transport the tools securely and return them to secure storage after use; an employer's purchase does not change the access rule.

2. Build the journal from the facts of the act (5 minutes)

Record the date, time, and type of official act; the character of the instrument; the required signature; satisfactory-evidence information; and the actual notarial fee. 'Document' does not describe an instrument as usefully as its actual character, such as deed of trust. A title and a notarial act are different fields: an affidavit is a document; a jurat is an act. Record zero when no fee is charged.

For documentary identification, record the document type, issuing agency, identifying number, and issue or expiration date. Merely writing 'ID checked' loses required information. Witness-based identification has different signature and identification-record requirements, developed in Essential Basics. Complete the record during the appointment while the required people can sign and provide any required prints. Do not plan to reconstruct it at the end of the day.

A separate entry for each document is a clear practice. The SOS FAQ permits a combined entry only if all required information is recorded for each document. A vague 'loan package' description is not a substitute for the required

particulars of its notarized instruments.

Participation exercise

Use three minutes to draft a mock entry with invented data: October 8, 10:15 a.m.; acknowledgment of a deed of trust; signer Mia Chen; California DMV license; $15 fee. List each field and flag the information the scenario has not supplied. Do not invent a real ID number or claim a signature was collected.

Reviewer debrief

The date, time, act, instrument character, agency, ID type, and fee are given. You still need the actual identifying number and issue or expiration date, satisfactory-evidence determination, Mia's journal signature, and the required print. In a real appointment obtain missing facts and participation; classroom blanks are not permission to leave the official record incomplete.

3. Collect required prints and handle physical limitations (4 minutes)

For a deed, quitclaim deed, deed of trust, other document affecting real property, or power of attorney, obtain the signer's right thumbprint in the journal. The statute excludes a qualifying trustee's foreclosure deed and a deed of reconveyance from this print requirement. Identify the instrument accurately before applying an exception.

If the right thumb is unavailable, use the left thumb or an available finger and note which was used. If the signer is physically unable to supply any thumbprint or fingerprint, record that fact and explain the physical condition. Refusal because of privacy concerns is different from physical inability. The notary cannot turn a preference into the statutory exception. The print belongs in the journal; it is not a substitute for the signature or the identity check.

Participation exercise

Sort four cases and explain each: a power of attorney with an available right thumb; a deed of trust with a bandaged right thumb and usable left thumb; physical absence of usable fingers; a grant deed signer who simply declines a print. Spend two minutes before revealing.

Reviewer debrief

Collect the right thumbprint for the power of attorney. Use and identify the left thumb for the deed of trust. Document the physical inability and its condition when no print is physically possible. Do not complete the grant deed act while the required print is refused; preference does not establish physical inability.

4. Inspect the seal before releasing the certificate (4 minutes)

The seal must be photographically reproducible and contain the required state seal, words Notary Public, commissioned name, filing county, commission expiration, commission number, and manufacturer/vendor identification number. Its border and dimensions are regulated: a circle no more than two inches in diameter or a rectangle no more than one inch by two and one-half inches. A decorative stamp is not a compliant substitute.

Use the seal to authenticate an authorized notarial act, not to endorse a business letter or advertise official approval. Check that the impression is legible and does not cover text or signatures. Finish the certificate before signing and sealing it; a stack of pre-signed, pre-stamped blank certificates exposes official authority to misuse. The limited subdivision-map exception in Government Code section 66436(c) has its own adjacent identifying text; it is not a general option whenever a stamp is inconvenient.

2027 electronic seal and procurement - AB 1977 sections 4-5: Section 8207 separates a tangible seal, kept locked and secured under exclusive control with a legible photographically reproducible impression, from an electronic seal, kept encrypted and under exclusive control. Electronic storage or online media must use secure multifactor authentication and at least SOS security requirements. Never allow another person to access or use the electronic seal; take reasonable steps against unauthorized disclosure, access or use. The seal remains the notary's property even if an employer pays. On termination, resignation or revocation of the commission, destroy or deface it as required. An image pasted by a coworker is not compliant seal handling.

The seal identifies the notary, California Great Seal, Notary Public title, oath-and-bond county, expiration and commission number; amended section 8207(a)(7) specifies the sequential identification number assigned to the electronic seal manufacturer or vendor. The existing size and border limits remain. Section 8207.2 requires authorized manufacture/sale and an SOS certificate of authorization to purchase a stamp or electronic seal. Its $100 processing fee applies to the manufacturer/vendor permit; it is not the fee charged to a signer for notarization. Retain the issued seal's required identifiers and confirm SOS procurement/security specifications before using an electronic seal.

Participation exercise

Inspect a sample seal or list its required fields from memory, then compare with the lesson. Explain why these proposed uses fail: stamping a character reference, lending the stamp to a licensed coworker, and stamping blank certificates for tomorrow. Allow two minutes.

Reviewer debrief

The seal identifies your commission and authenticates your acts. A character endorsement is outside that purpose. Another notary must use that person's own authority and seal. Blank certificates cannot truthfully establish an act that has not yet occurred. A clear impression alone does not make any of these uses lawful.

5. Respond to journal requests and loss (4 minutes)

A qualifying public written request identifies the parties, document type, and month and year of notarization. Respond within 15 business days with a copy of the requested line item or an acknowledgment that it does not exist. The copy charge may not exceed $0.30 per page. Provide the requested transaction, protecting unrelated entries from unnecessary disclosure. This is not unrestricted public browsing of your whole journal.

If the journal is lost, stolen, misplaced, destroyed, damaged, or unusable, notify the Secretary of State immediately by certified or registered mail or another physical delivery method providing a receipt. Include the entry period, commission number, expiration, and an applicable police-report copy. Seal loss also requires immediate written notification using the prescribed method. A peace officer's lawful seizure is different: obtain a receipt, notify the Secretary of State within 10 days, and obtain a new sequential journal. If the old journal returns after the new one has begun, do not resume entries in the old one.

Participation exercise

Use two minutes to build a response chart for (a) a complete public request, (b) a missing journal, and (c) a lawful seizure. Identify trigger, time period, recipient, and evidence to retain.

Reviewer debrief

Public request: respond to the requester within 15 business days, retaining the request and response. Missing journal: immediate SOS notice with required details and delivery evidence. Seizure: officer receipt, SOS notice within 10 days, and a new sequential journal. Do not borrow the public-copy deadline for either incident.

6. Audit a full appointment record (5 minutes)

A final review compares the journal with the act actually performed. Does the recorded time correspond to this appointment? Does the act match the certificate? Are each signer's identity basis, required signature, and applicable print recorded? Does the fee entry reflect the notarial amount actually charged rather than the whole travel invoice?

Treat omissions as facts to resolve while participants remain available. Never add a made-up signature, ID number, or print later. A neat record with invented facts is worse than an honestly identified problem. The following rehearsal uses deliberately incomplete information; your job is to distinguish what can be checked from what requires the signer's participation.

Participation exercise

Spend four minutes writing an audit note: a deed acknowledgment entry lists only 'closing,' today's date, a driver's license number, and a $50 amount combining travel and service. The signer has not signed the journal; no print appears. Identify at least six corrections or inquiries and the point at which you would pause the appointment.

Reviewer debrief

Identify the instrument character and actual act, record the time, identify the issuing agency and ID type plus issue/expiration date, document satisfactory evidence, obtain the signer's journal signature and required print, and distinguish the lawful notarial fee from travel. Resolve these during the appointment. Do not release a completed act on the assumption that signatures or prints can be filled in later.

Module scenario: A shared drawer and an incomplete entry

An employer offers a shared drawer for the seal. The journal entry for a power of attorney has an ID number but no agency, date, signature, or print.

Identify the access failure and the missing participation before completing the appointment.

Review point: Use secure storage under the notary's exclusive control.

Review point: Complete the required identification details, signature, and print; employer convenience cannot waive them.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

Module quiz and correction | 8 minutes

II-A-v2-Q1

A mobile notary proposes one active journal for home visits and another for office clients. What should change?

A. Replace both with scanned documents

B. Use separate journals only for different counties

C. Use one active sequential journal across both settings

D. Keep both if each client uses only one

Answer: C. The rule requires one active sequential journal, not one per workplace. Client grouping and document scans do not satisfy that requirement.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-v2-Q2

A deed of trust signer has an unusable right thumb but an available left thumb. What is the appropriate record?

A. A second signature instead of a print

B. The left thumbprint with a notation of which thumb was used

C. No print, with a note about the right thumb

D. The notary's print as witness

Answer: B. Use the available alternative and identify it. Inability to use the right thumb is not inability to supply any print, and another person's print is not a substitute.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-v2-Q3

A requester names the parties, instrument type, and month and year in a written journal-copy request. When is a response due?

A. Within 30 calendar days of notarization

B. At the next commission renewal

C. Only after obtaining the signer's permission

D. Within 15 business days of receipt

Answer: D. A qualifying public request triggers a 15-business-day response. It does not depend on renewal, the original act's date, or obtaining the signer's permission.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-v2-Q4

An employer owns the desk, and all staff have its drawer key. Is that drawer adequate for the notary's journal and seal?

A. Yes, if the employer paid for the tools

B. Yes, if a privacy notice is posted

C. No, shared access defeats direct and exclusive control

D. No, because tools may never be stored at work

Answer: C. The problem is shared access, not the workplace location. A secured area under the notary's exclusive control can be used at work.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-v2-Q5

A requester is entitled to a two-page journal line-item copy. What is the maximum copy charge under section 8206(c)?

A. $0.30 total

B. $0.60 total

C. $15 per notarized signature

D. $30 because two pages are involved

Answer: B. The limit is $0.30 per page, so two pages permit $0.60. The fee for performing a notarial act is a different charge.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-v2-Q6

A journal entry says 'driver license checked.' What information is missing from the documentary-ID record?

A. The employer's approval code

B. The type, issuing agency, identifying number, and issue or expiration date

C. Only the signer's current phone number

D. A photocopy of the entire license

Answer: B. The law specifies identification particulars. A phone number, employer code, or retained photocopy does not replace the required journal information.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-v2-Q7

A customer refuses the required print for a grant deed solely for privacy reasons. What should the notary do?

A. Write that the right thumb was unavailable

B. Accept an extra journal signature instead

C. Complete the act if satisfactory ID is shown

D. Pause rather than claim the physical-inability exception

Answer: D. A preference not to provide a print is not physical inability. Identification and journal signatures do not waive a separate mandatory print requirement.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-v2-Q8

A notary discovers the active journal is missing. Which action matches the reporting duty?

A. Immediately notify the SOS through a prescribed receipt-producing physical method

B. Report it with the next reappointment application

C. Wait 15 business days while searching

D. Notify only the bond company

Answer: A. Missing or unusable journals require immediate SOS notification with the required details. Search efforts and other notifications do not postpone it.

Source: Government Code §§ 8206, 8206.5, 8207, 8207.3, 8212; Handbook, Journal and Seal

II-A-2027-Q9

In 2027, authorized seal vendor Rosa pays the section 8207.2 $100 permit processing fee. Notary Max says this lets him charge each signer $100 for a jurat. Which rule applies?

A. The vendor permit fee replaces all notarial fee caps

B. The $100 permit fee concerns the manufacturer or vendor; Max must apply the separate section 8211 act limit

C. A signer must purchase a seal before every act

D. Any online seller may manufacture a seal without authorization

Answer: B. Section 8207.2 governs authorized seal manufacture and procurement, including the vendor permit. It does not create a $100 fee for a jurat. A compliant stamp or electronic seal requires the authorization process.

Source: AB 1977 sec. 5; GC 8207.2; AB 1597 sec. 2, GC 8211(b).

II-A-2027-Q10

In 2027, employer Ana paid for notary Ben's electronic seal. Ana asks Ben to share its login with clerk Carlo so Carlo can affix it while Ben is away. Who must refuse and why?

A. Ben must refuse: payment does not transfer ownership or permit another person to access or use his seal

B. Carlo may use it if Ana supervises

C. Ana owns the seal because she paid

D. Sharing is lawful if no customer complains

Answer: A. Ben retains exclusive control. Electronic seals must be encrypted and secured, including secure multifactor authentication for storage or online access. Neither employer payment nor consent authorizes delegation.

Source: AB 1977 secs. 4-5; GC 8207(e)-(f), 8207.2.

II-B1: Types of Notary Public Acts and How to Perform the Acts | Essential Basics

Essential basics: decide whether an appointment can proceed

Practice identity evaluation, credible-witness screening, direct communication, certificate review, and stop decisions. 46 minutes of instruction and written simulations, then an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Triage the request before touching the seal (5 minutes)

Start by identifying the requested act and the person whose participation it requires. Ask for the complete document and certificate instructions. Check for a disqualifying interest, a current effective commission, and a location within California. An employer's urgency is useful scheduling information; it is not evidence of identity or authorization.

Distinguish facts from labels. 'It just needs a stamp' does not identify an act. 'The attorney sent it' does not prove that the correct signer is present. You may explain the procedural difference between an acknowledgment and a jurat, but a non-attorney notary must not choose the legal act or document for the customer. If instructions are missing, the customer can obtain them from the receiving party or legal adviser.

For ordinary acknowledgments and jurats, the signer must physically appear. A spouse carrying the document cannot supply the absent signer's acknowledgment or oath. Proof by a subscribing witness is a separate, narrow act covered later, not an excuse to complete an ordinary acknowledgment for an absent signer.

Participation exercise

Use three minutes to write an intake script for a courier carrying a signed deed with no certificate. Ask three factual questions, identify what is missing, and explain a next step without selecting an act or promising that a witness can solve the problem.

Reviewer debrief

Ask which act has been requested, who signed, and whether that signer will appear with the complete instrument. The absence and missing instructions prevent the requested ordinary act from proceeding. Refer the customer to the receiving party or attorney for the act selection and arrange the required personal appearance; a deed cannot be routed casually through subscribing-witness proof.

2. Screen identification by category and condition (6 minutes)

Satisfactory evidence includes both an authorized identification method and the absence of circumstances that would cause a reasonable person to doubt the claimed identity. A document's title alone does not settle the matter. Compare the presented person and the identification and resolve significant discrepancies before proceeding. Personal familiarity with the signer is not an independent identification method.

Civil Code section 1185 includes California DMV identification or licenses and U.S. passports, which must be current or issued within five years. The statute also recognizes specified custody-related inmate identification. Additional listed categories include other-state licenses or ID cards, Canadian or Mexican driver's licenses, qualifying foreign passports or consular IDs, U.S. military IDs, California government employee IDs, and federally recognized tribal IDs. Those additional categories require a photograph, physical description, signature, identifying number, and the applicable date conditions; the foreign passport/consular category also specifies validity and country of citizenship.

Do not generalize 'government issued' into approval of every card. A private employer badge is outside the list. A military card may fail because a required element is missing. An expired California license is not automatically unusable if it was issued within five years, but one older than five years and expired fails that date test. Read both the category and the particulars.

Participation exercise

Spend four minutes making a decision table: a current private-company photo badge; an expired California license issued three years ago with matching information; an expired California license issued seven years ago; a current military ID lacking a signature. For each, identify whether the stated facts satisfy the method and what else must still be checked.

Reviewer debrief

The private badge is not a listed category. The three-year-old California license can meet the date rule, subject to reasonable reliance and no contrary circumstances. The seven-year-old expired license fails that test. The military ID lacks a required element. Even an otherwise acceptable card cannot override reasonable identity doubts.

3. Evaluate doubt rather than averaging the evidence (5 minutes)

An accepted category of identification is a starting point, not an instruction to ignore contrary facts. A photograph that clearly depicts someone else, conflicting identifying information, or an unexplained mismatch may prevent reasonable reliance. Two weak documents do not combine into a statutorily authorized method. A customer who offers to assume all liability does not transfer the notary's duty.

Ask factual questions and seek satisfactory evidence without giving legal advice or making unsupported accusations. An identification problem may be resolvable through another permitted document or, when its conditions actually exist, credible witnesses. A forgotten wallet does not by itself satisfy the witness conditions. If the available facts remain insufficient, stop and explain which requirement has not been met.

Do not infer that everyone with a similar name is the same person or invent a rule that every minor name variation always disqualifies a signer. Compare the actual evidence with the person described in the instrument and the statutory standard. A sound decision states what is established and what remains doubtful.

Participation exercise

Use three minutes to draft two responses: (1) a long-time neighbor offers no authorized ID; (2) a stranger presents an apparently permitted card whose photograph plainly conflicts with the person present. Avoid accusing either of a crime. State what would be needed to revisit the request.

Reviewer debrief

For the neighbor, familiarity alone is insufficient; ask about an authorized document or a genuinely qualifying witness path. For the stranger, the card category does not cure reasonable doubt. Pause until satisfactory evidence can establish identity; a disclaimer or payment does not cure either issue.

4. Use one credible witness only when all conditions fit (6 minutes)

For the single-credible-witness method, the notary must personally know the witness, and the witness must personally know the signer. The witness must also present satisfactory documentary identification. Personal knowledge of the witness does not waive that document check.

Under oath or affirmation, the witness must establish that the signer is the person named in the document and personally known to the witness; that it would be very difficult or impossible for the signer to obtain another form of identification; that the signer has none of the authorized identification documents; and that the witness has no financial interest and is not named in the document. These are substantive statements, not a casual promise that the person is trustworthy.

Screen each condition before using this route. Someone named as a beneficiary cannot cure the problem by saying they expect no immediate payment. A witness who met the signer in the lobby cannot claim personal knowledge based on introductions. Record the required witness signature or the specified witness identification particulars in the journal, as well as the other requirements for the act.

Participation exercise

Spend four minutes creating a six-point witness interview. Then apply it: your longtime coworker knows a signer who has no authorized ID and faces genuine difficulty obtaining one, but the coworker is named as a beneficiary in the instrument. Identify the decisive issue and write the explanation you would give.

Reviewer debrief

Check personal knowledge by the notary, witness ID, personal knowledge of the signer, the identity assertion, the difficulty/no-ID conditions, and absence of a named or financial interest. The named beneficiary fails an independent condition. Strong relationships and genuine ID difficulty do not cancel that disqualification.

5. Distinguish two credible witnesses from one (5 minutes)

When the notary does not personally know a qualifying witness, the two-witness method can establish identity if both witnesses satisfy the statutory conditions. Each must personally know the signer, present satisfactory documentary identification, and swear or affirm the required statements under penalty of perjury. Two witnesses do not make the no-ID and difficulty conditions optional.

Both witnesses sign the journal, and their identification details must be recorded. Contrast that with the single-witness journal alternative. The signer's own participation and journal signature remain necessary. Witnesses establish identity; they do not execute the signer's acknowledgment, take the signer's oath, or sign for the signer merely because they have supplied identity evidence.

A reliable worksheet separates people by role: signer, witness one, witness two, and notary. Record what each person knows, what evidence each supplies, and which statements each makes. This prevents the common mistake of treating any pair of available adults as sufficient.

Participation exercise

Use three minutes to compare two cases. In A, both witnesses personally know the signer and satisfy all other conditions, but neither knows you. In B, one witness knows the signer and the other met the signer today. For each, identify whether the method is available and whose journal signatures and ID details are needed.

Reviewer debrief

A can use the two-witness method when all conditions and oaths are satisfied; personal acquaintance with the notary is not required for that route. B fails because both must personally know the signer. In A, record both witnesses' signatures and identification particulars along with the signer's required entry and participation.

6. Inspect completeness and communicate directly (5 minutes)

Review the document for evident incompleteness without drafting missing legal provisions. A missing material amount, unnamed party, or blank provision to be supplied later can prevent notarization. The notary should not fill legal terms from assumptions. A space meant for a later separate notarial certificate is different from an uncompleted substantive term; identify the function of the blank rather than judging only its appearance.

A document in another language may be notarized if the notary can perform all duties, communicate directly with the signer, and determine that the document is complete. The notarial certificate must be in a language the notary understands. Do not rely on an interpreter to communicate the necessary acknowledgment or oath with the signer. A translation of a document is also distinct from a notarial certification of that translation.

Electronic documents do not automatically authorize remote appearance. Under the current SOS guidance, California notaries must still require physical appearance for acknowledgments and jurats. The state's online-notarization law has staged implementation; another state's remote service or an app subscription does not activate California authority.

Remote terminology - AB 1977 section 22, section 8231.18: This section addresses a business platform facilitating a remote act by a notarial officer located in a state other than California for a principal who represents being in California. Audio-video communication is real-time seeing, hearing and communicating; its recording is a separate record. An electronic journal is the sequential record of those facilitated acts. Encryption makes data unreadable to unauthorized persons; open format means platform-independent, machine-readable information available without reuse restrictions. A notarial officer includes an authorized notary or other authorized individual; a notary public is a commissioned individual. A notarial act under this section derives from another state, foreign or federal law; a record may be tangible or electronic and retrievable. State includes the District of Columbia and specified US territories. These definitions do not commission a California notary to act remotely.

For covered transactions, the business has duties including encrypted journal records, secure multifactor access, recording in open format without images of the notarized document, and copies for the principal. Those platform duties are distinct from the notary's duties and are not a substitute for them. California's own online-notarization framework has separate implementation, rules, registration and training requirements; its staged operation is not activated by the January 2027 electronic-seal amendments. Check SOS implementation status before offering remote service; do not infer a guaranteed launch from a future target date.

Participation exercise

Spend three minutes identifying the separate barriers in this appointment: the signer appears by video, a relative offers to translate every response, and the instrument's payment amount is blank. Write a response that explains each barrier without filling the amount or selecting a different legal act.

Reviewer debrief

Physical appearance remains required under current California guidance. The notary must communicate directly with the signer for the act. The material blank must be completed by the responsible party before notarization. Fixing only one of these conditions does not cure the other two.

7. Reconcile certificate, journal, and actual events (6 minutes)

The certificate states facts about an act. Use the actual date and venue, identify only those who appeared for that act, and complete the required wording before signing and sealing. The printed document date and a lender's preferred closing date do not replace the actual appearance date. Verify that the certificate is for the act requested; a stamp by itself is not a certificate.

Use the journal to record the act, not to make a conflicting certificate acceptable. If the journal says Tuesday and the certificate knowingly says Monday to satisfy a deadline, one accurate record does not cancel the false one. Record the correct facts consistently.

If a completed act is later found erroneous, the SOS handbook directs a new notarization meeting all requirements, with a new certificate using the new act's date and a new journal entry. Do not mail a replacement backdated certificate or alter a completed act to imply that the signer appeared again. Preventing errors before release is therefore much easier than addressing a completed erroneous act.

Electronic signatures in 2027 - AB 1977 section 3: For the acts listed in section 8205(a)(2)-(4), the notary may sign in their own handwriting or use their electronic signature. The electronic signature must include an image of the notary's handwritten signature matching the official oath. Storage or online media must use secure multifactor authentication and at least SOS security requirements. Do not allow another person to access or use it; take reasonable protective steps. These provisions concern the notary's signature, not permission for an absent signer to appear by video. The requirements for identity, a truthful certificate, the applicable acknowledgment or oath, and the journal remain.

Participation exercise

Spend four minutes auditing this mock file: signer Elena appeared in Orange County on October 10; the document is dated October 7; the acknowledgment says Los Angeles County, October 7, and names Elena and her absent spouse. Write the correct facts for a certificate being prepared now. Then explain what changes if the erroneous act was already completed and delivered.

Reviewer debrief

Before completion, use Orange County and October 10 and identify only Elena, assuming she satisfies every requirement and acknowledges execution. The absent spouse cannot be included. After an erroneous act has been completed, follow the handbook's new-notarization procedure; do not simply send a corrected certificate that implies facts from the original encounter.

8. Run the complete appointment simulation (8 minutes)

Combine the gates instead of treating them as independent trivia. A complete identity check does not cure an incomplete document. A proper certificate does not cure an omitted oath. A signer willing to return later does not permit today's certificate to say the future appearance already occurred.

Use this order for a written rehearsal: establish authority and requested act; inspect the document; confirm necessary personal appearance and communication; establish identity; carry out the act-specific acknowledgment

or oath/signing; complete the journal and certificate; review the fee and secure the tools. The order of preparation can vary, but every required element must actually occur. Mark each fact as supplied, missing, or inconsistent.

Participation exercise

Spend six minutes writing an appointment plan for a physically present signer requesting a jurat on a completed declaration signed yesterday. The signer has a qualifying current California ID and can communicate directly. A supervisor asks for yesterday's certificate date. Include the new signing, oath, journal, venue, certificate date, fee record, and refusal of the requested shortcut. Use the remaining two minutes to change the case to an acknowledgment and compare what differs before reading the debrief.

Reviewer debrief

For the jurat, verify identity, administer an oath or affirmation, and require signing in your presence; yesterday's signature alone is insufficient. Complete today's actual venue/date and journal record, including the actual fee, and secure the tools. Reject backdating. If an acknowledgment is properly requested instead, an earlier signature may be acknowledged, but physical appearance, identification, journal, and truthful current certificate facts still apply. The supervisor cannot choose a false date for either act.

Module scenario: Three independent gates

A familiar client has forgotten ID, asks for an acknowledgment over video, and promises to fill the payment amount later.

Explain why solving identity alone would not make this appointment ready.

Review point: Personal familiarity is not an authorized stand-alone identity method.

Review point: Physical appearance and document completeness remain independent requirements.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

Module quiz and correction | 8 minutes

II-B1-v2-Q1

An expired California license was issued three years ago and otherwise supports reasonable reliance. Which conclusion follows?

A. It is usable only with two witnesses

B. It can meet the date condition because it was issued within five years

C. It is acceptable solely because the signer is familiar

D. Expiration alone always disqualifies it

Answer: B. The statutory test for this category is current OR issued within five years. Reasonable reliance and absence of contrary identity evidence still matter.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-v2-Q2

A current military ID lacks a signature. What should the notary recognize?

A. Every federal card is automatically sufficient

B. A journal signature supplies the missing card element

C. It is sufficient only for a jurat

D. This category requires a signature along with other specified elements

Answer: D. The additional-category requirements include a signature, photograph, description, and identifying number. A journal signature does not repair a nonqualifying card.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-v2-Q3

One proposed credible witness is known personally to the notary and signer but has brought no identification document. What is missing?

A. Nothing, because personal knowledge suffices

B. Satisfactory documentary identification of the witness

C. An affidavit from the signer replacing witness identification

D. A journal signature from the signer replacing witness identification

Answer: B. The single-witness method requires both personal knowledge by the notary and documentary identification of the witness. One does not replace the other.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-v2-Q4

Two witnesses have acceptable ID, but only one personally knows the signer. Is that enough?

A. No, because the notary must always know both witnesses

B. Yes, because two IDs are presented

C. No, both witnesses must personally know the signer

D. Yes, if the witness who knows the signer vouches for the other witness

Answer: C. Both must personally know the signer and swear to the required facts. The two-witness method does not require the notary to know them personally.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-v2-Q5

A signer has a valid authorized ID at home and merely wants to avoid returning for it. May witnesses automatically replace it?

A. Yes, if the notary records the inconvenience

B. Yes, if two coworkers volunteer

C. Yes, when the document is urgent

D. No, the no-authorized-ID and difficulty conditions must actually be met

Answer: D. The witness route is not a convenience substitute. Possession of authorized ID and the statutory difficulty conditions must be assessed, not assumed away.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-v2-Q6

A non-attorney notary is handed a complete document without notarial wording and asked to choose whatever act is legally best. What is appropriate?

A. Choose a jurat because it includes an oath

B. Choose an acknowledgment because it is more common

C. Stamp the signature without a certificate

D. Explain procedural differences and have the customer obtain the selection

Answer: D. A procedural explanation is permitted; selecting the legal act for the customer is not. An unexplained stamp cannot replace the proper certificate.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-v2-Q7

A signer is physically present, but the notary can communicate only through the signer's relative. Which concern remains?

A. The notary cannot communicate directly with the signer for the act

B. The relative must first sign as an interpreter in the journal

C. The document must be in English in every case

D. The relative can take the oath instead

Answer: A. Direct communication is required for the notarial exchange. A foreign-language document is not automatically prohibited, and a relative cannot supply the signer's oath.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-2027-Q8

In January 2027, California notary Phil obtains an electronic seal. John joins by video from San Jose; Phil points to section 8231.18 as authority. What is the correct analysis?

A. An electronic seal alone authorizes video appearance

B. John may authorize Phil to disregard appearance rules

C. Section 8231.18 concerns covered out-of-state officers and platforms; it does not itself authorize Phil's California remote practice

D. A paid app replaces SOS authorization

Answer: C. Electronic signatures and seals are not the same as authority for a California notary to perform remote online acts. Section 8231.18 defines the covered remote officer as located in a state other than California.

Source: AB 1977 secs. 3-4, 22; GC 8205, 8207, 8231.18(a); staged Online Notarization Act.

II-B1-v2-Q9

A completed and delivered certificate contains an error. Which approach follows the handbook?

A. Mail a backdated replacement without another appearance

B. Change the journal to agree with the error

C. Perform a new notarization meeting all requirements with a new date and entry

D. Ask the recipient to amend the notary's wording

Answer: C. The handbook directs a new act with all requirements, a new certificate date, and journal entry. Unwitnessed replacements do not establish the necessary facts.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B1-v2-Q10

An otherwise acceptable ID has a photograph clearly inconsistent with the person present. What controls?

A. The unresolved identity doubt prevents reasonable reliance

B. The accepted card category resolves the issue

C. The client's liability waiver resolves the issue

D. A second unlisted card automatically resolves the issue

Answer: A. Satisfactory evidence requires no circumstances creating reasonable doubt as well as an authorized method. Card labels and waivers cannot override the discrepancy.

Source: Civil Code § 1185; Government Code §§ 8202, 8205-8206; SOS Notary FAQs, Remote Online Notarization

II-B2: Types of Notary Public Acts and How to Perform the Acts | Acknowledgments

Acknowledgments: certify the encounter accurately

Distinguish acknowledgment from signature witnessing, complete truthful certificate facts, and recognize prohibited capacity statements. 14 minutes of instruction and case work, then an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Civil Code §§ 1185, 1188-1189; Government Code § 8206; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Establish what the signer acknowledges (4 minutes)

An acknowledgment confirms the identified signer's personal appearance and acknowledgment of executing the instrument. The signature may have been placed on the document before the appointment. The notary does not have to observe the original signing, but must obtain the signer's acknowledgment of execution during the appearance. A mailed document and a familiar signature do not supply that encounter.

Do not confuse acknowledgment with agreement that every factual assertion in the document is true. A jurat includes an oath or affirmation concerning the statement; an acknowledgment does not automatically do so. Likewise, witnessing a fresh signature without obtaining acknowledgment of execution leaves an element unaddressed. Ask the signer directly rather than assuming that handing over a document means the required acknowledgment occurred.

For multiple signers, determine who is actually appearing and whose signature is being acknowledged. One spouse's acknowledgment cannot establish the other's appearance. The certificate should not name absent parties merely because their names are printed together on the document.

Participation exercise

Use two minutes to rehearse the conversation with a signer who signed yesterday. Then change the facts: the signer says the signature belongs to a spouse who is absent. State what can proceed in each version and why.

Reviewer debrief

An identified, personally present signer may acknowledge that signer's earlier signature if all requirements are met. A spouse cannot acknowledge another person's signature as though that person appeared. Do not certify the absent spouse's appearance or substitute household familiarity for the required encounter.

2. Complete the California certificate (4 minutes)

Use the prescribed acknowledgment wording, including the legible boxed identity notice. Complete the actual state and county of the act, date of appearance, notary's name and title, and appearing signer's name. Sign and seal only after the certificate is complete. A document's signing date may differ from the date of acknowledgment; the certificate records the latter.

The notice limits the notary's certification: identity is verified, not the document's truthfulness, accuracy, or validity. It does not cancel the notary's responsibility for the certificate's own factual statements. Those statements are

made under penalty of perjury. A customer cannot authorize the notary to backdate, include a nonappearing person, or certify unsupported facts.

When attaching a certificate, associate it with the instrument being notarized and review it before release. Never hand out a blank signed and sealed certificate for someone else to attach later. A properly completed journal supports the encounter but cannot make a false certificate acceptable.

For a 2027 electronic acknowledgment, the notary signature requirements of section 8205(b) apply: image matching the official oath, protected access and no delegation. The change does not permit certifying absent co-signers or omitting personal appearance. The acknowledgment still concerns the appearing signer's execution; it does not require that a previously signed document be signed again merely because it was signed earlier.

Participation exercise

Spend two minutes drafting the factual fields: the document was signed August 2; the signer appears August 9 in Fresno County; the notary filed the oath in Alameda County. List the correct date and county, and explain why neither earlier signing nor the seal's county controls.

Reviewer debrief

Use August 9 and Fresno County. Alameda is the filing county and August 2 is the document's signing date; neither describes this acknowledgment encounter. The journal and certificate should reflect the actual act consistently.

3. Separate capacity wording from capacity certification (3 minutes)

A signer may execute a document for an entity or in a representative role. California acknowledgment wording reports that the signer acknowledged execution in an authorized capacity; it does not require the notary to independently certify the person's legal authority as trustee, officer, or agent. Do not add a statement that you verified corporate authority or the legal sufficiency of a power of attorney.

Civil Code section 1189 permits an acknowledgment form required by another U.S. state or jurisdiction for a document to be filed there, provided it does not require prohibited determinations, including certification of representative capacity. Read the actual wording. A receiving office's demand does not enlarge California authority, and the mere presence of an out-of-state heading does not automatically make every form unusable.

Participation exercise

Use one minute to compare these certificate demands: 'personally appeared Jordan' and 'I certify Jordan is the duly authorized president of this corporation.' Explain which additional assertion creates a problem for the California notary.

Reviewer debrief

The second asks the notary to certify legal representative authority. Identifying Jordan and obtaining acknowledgment does not establish that authority. Obtain lawful certificate instructions instead of signing the prohibited assertion.

4. Rehearse a refusal and a corrected plan (3 minutes)

An effective refusal identifies a failed requirement and a lawful next step. Avoid broad statements such as 'already signed documents cannot be notarized' or 'out-of-state documents are forbidden.' These statements would deny lawful service for the wrong reasons. Explain the actual obstacle: absence, unsatisfactory identity, incomplete instrument, unsupported certificate wording, or a disqualifying interest.

Perform a final review with the signer still present. Confirm that the acknowledgment occurred, the journal is complete, the certificate names only participants in this act, the venue and date are true, and the seal is legible. If you cannot complete a required step, stop rather than promising to repair the official record later.

Participation exercise

Use two minutes for the case below. Write a two-sentence explanation of what is allowed and what must be declined; do not choose a different legal act for the signer.

Reviewer debrief

An earlier signature can be acknowledged today after proper appearance, identification, and acknowledgment. The requested earlier certificate date must be declined, and no absent co-signer may be included. A truthful current certificate describes today's act.

Module scenario: Yesterday's signature, today's appearance

A signer appears today with a document signed yesterday and asks to keep yesterday's date on the acknowledgment because a deadline passed.

Distinguish the permissible earlier signature from the impermissible certificate date.

Review point: Prior signing does not bar an acknowledgment.

Review point: Use the actual date of appearance and acknowledgment, not the preferred deadline date.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

Module quiz and correction | 8 minutes

II-B2-v2-Q1

A properly identified signer personally appears with an instrument signed last week and acknowledges executing it. What is correct?

A. The acknowledgment may proceed if all other requirements are met

B. The instrument must always be signed again

C. The certificate must use last week's date

D. A jurat is required because the signature is old

Answer: A. Acknowledgment does not require signing in the notary's presence. The actual acknowledgment date controls the certificate, and the notary cannot select a jurat merely because of prior signing.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q2

Two spouses signed a deed, but only one appears for acknowledgment. Whom can this certificate identify as having appeared?

A. Both if the present spouse recognizes the signatures

B. Both if the absent spouse sends an ID image

C. Neither because the document has two signers

D. Only the spouse who actually appears and meets the requirements

Answer: D. A certificate cannot report the absent spouse's appearance. A proper act for the appearing spouse may proceed without falsely including the other signer.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q3

A document dated July 1 is acknowledged July 10 in Sonoma County. The notary's seal names Napa County. Which certificate facts apply?

A. July 10, Sonoma County

B. July 1, Sonoma County

C. July 10, Napa County

D. July 1, Napa County

Answer: A. Certificate date and venue describe the acknowledgment encounter. Neither the document date nor the county engraved on the seal changes where and when it occurred.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q4

An out-of-state acknowledgment demands that the California notary certify the signer is a duly authorized corporate officer. What is the issue?

A. Only the typeface must change

B. The form requires a prohibited capacity determination

C. The notary must attach the signer's business card to validate capacity

D. All out-of-state forms are forbidden

Answer: B. The specific unsupported certification is the obstacle. California allows certain out-of-state acknowledgment forms, but not prohibited representative-capacity determinations.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q5

What does the boxed identity notice mean for a recipient evaluating the document?

A. The notarization does not certify document truth, accuracy, or validity

B. The notary has no responsibility for certificate facts

C. The signature has been evaluated by a handwriting expert

D. The notary guarantees every statement in the document

Answer: A. The notice limits what is certified about the document. It does not excuse false statements about appearance, identity, date, or acknowledgment in the certificate itself.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q6

A client asks for a signed, sealed acknowledgment with the name and date left blank for later completion. What should happen?

A. Release it without charging

B. Complete only the venue and release it

C. Decline to issue an incomplete official certificate

D. Release it if the client is a lawyer

Answer: C. The certificate must be complete when signed and sealed. A client's profession, no fee, or a partly filled form cannot supply future facts.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q7

A signer places a fresh signature on an instrument but has not acknowledged execution. Is watching the signature alone the whole acknowledgment?

A. Yes, fresh signing replaces every verbal exchange

B. Yes, if the journal signature matches

C. No, every acknowledgment also requires an oath about document truth

D. No, obtain the signer's acknowledgment of execution

Answer: D. Obtain acknowledgment of execution rather than assume the required act. An oath about truth belongs to a jurat and is not automatically part of an acknowledgment.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q8

A longtime client's signed instrument arrives by courier for an ordinary acknowledgment. The client does not appear. What controls?

A. The courier's promise that the client signed

B. The missing personal appearance prevents that act

C. The document's date determines whether appearance is needed

D. The notary's recognition of the signature

Answer: B. An ordinary acknowledgment requires the signer's appearance. Familiarity, courier assurance, and the document date do not satisfy it.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-v2-Q9

An acknowledgment form required for filing in another U.S. state contains no prohibited determinations. What should the California notary do?

A. Reject it solely because it is from another state

B. Evaluate and use the permitted form if all California conditions are met

C. Apply the other state's identification rules instead

D. Change the venue to the destination state

Answer: B. Section 1189 allows qualifying other-state forms. The notary still follows California duties and records the actual venue; destination does not transfer authority.

Source: Civil Code §§ 1185, 1188-1189; Government Code § 8206

II-B2-2027-Q10

In 2027, Phil uses an electronic signature for a properly performed acknowledgment. Assistant Rosa offers to apply it using Phil's shared login. Which is required?

A. A typed name with no oath-signature image is always sufficient

B. Rosa may sign if the signer agrees

C. Phil must control its use; the electronic signature includes an image matching his official oath signature and must be protected against others' access or use

D. An electronic signature removes personal appearance

Answer: C. The notary may use a compliant electronic signature under section 8205, but may not delegate access or use. The signature image must match the official oath; electronic storage or online media requires secure multifactor authentication and minimum SOS security.

Source: AB 1977 sec. 3; GC 8205(a)(2), (b).

II-B3: Types of Notary Public Acts and How to Perform the Acts | Jurats

Jurats: administer the oath and witness signing

Carry out a complete jurat and distinguish sworn participation from merely checking a signature. 13 minutes of instruction and practice, then an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8202, 8206, 8230; Civil Code § 1185; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Identify the additional acts a jurat requires (4 minutes)

A jurat records personal appearance, satisfactory evidence of identity, signing in the notary's presence, and an oath or affirmation. The label 'affidavit' can indicate the purpose of a document, but do not select a legal act solely from its title. Follow the properly requested act and required certificate.

If the statement was signed earlier, the prior signature alone does not satisfy the witnessed-signing element of a jurat. Have the signer sign in your presence as part of the properly conducted act. Checking the signature against an ID or asking whether it is theirs does not supply witnessed signing. Acknowledgment of an earlier signature is a different act.

The notary does not investigate whether the statement's contents are true. The signer takes responsibility through the oath or affirmation. The notary must be truthful about administering it, witnessing the signing, and establishing identity.

For 2027, electronic signature rules do not erase the jurat elements. The signer must personally appear, be satisfactorily identified, take an oath or affirmation and sign in the notary's presence. Unlike an acknowledgment, a prior signature alone does not complete a jurat. Section 8205(b) also governs the notary's electronic signature, including matching the oath signature and preventing access or use by others.

Participation exercise

Spend two minutes explaining the process to a customer who signed a requested jurat document at home. Include what must happen now and why recognizing the old signature is insufficient.

Reviewer debrief

The customer must personally appear, provide satisfactory evidence, take an oath or affirmation, and sign in the notary's presence. The certificate records the current encounter. The notary verifies performance of these steps, not the truth of the customer's underlying claims.

2. Make the oath or affirmation an actual exchange (3 minutes)

An oath or affirmation must actually be administered and answered. A useful direct question asks whether the signer swears or affirms that the statements in the document are true. The signer must give an affirmative response. Do not assume silence, a nod to a receptionist, or a printed paragraph alone proves the exchange occurred. Communicate directly and clearly.

An affirmation provides a nonreligious alternative with the same solemn purpose. Raising a right hand is traditional, not a legal requirement. Accommodating a preference for affirmation does not mean omitting the obligation to attest to the statement. A notary should not force religious wording or decline solely because someone cannot raise a hand.

If the signer refuses both an oath and an affirmation, do not complete a jurat. The requester may seek lawful instructions about the needed act, but the notary cannot silently change the requested act to avoid a requirement.

Participation exercise

Use one minute to write the question you would ask a signer who requests an affirmation and cannot raise a hand. Then explain what you would do if the signer refuses any assurance of truth.

Reviewer debrief

Ask directly whether the signer affirms the statements are true and obtain an affirmative response. A raised hand and religious wording are unnecessary. Refusal of both oath and affirmation prevents completion of the jurat; do not replace it with an acknowledgment on your own.

3. Complete the certificate without enlarging its meaning (3 minutes)

Use the California jurat wording and required boxed identity notice. Enter the actual date, venue, and name of the person who appeared and took the oath or affirmation. The certificate must reflect the act performed, not merely repeat the document's date. Complete the journal with the act type, instrument character, identity information, required signature, applicable print, and fee.

An affidavit's factual assertion may be outside the notary's knowledge. The certificate does not endorse that assertion; it attests to the notarial steps. If a requested certificate adds an assertion that the notary personally verified legal status or document accuracy, separate that unsupported assertion from the authorized jurat.

Government Code section 8230 adds a narrow verification duty for an identity statement containing age or birthdate and a purported photo or fingerprint: the specified certified birth certificate or DMV identification verifies age or birthdate. This special rule does not generally make a birth certificate alone satisfactory signer identification for all notarizations.

Participation exercise

Use one minute to separate three facts: the signer swore the statement was true; the notary witnessed the signature; the notary independently proved the statement's business claims. Which two belong to the notarial encounter, and why is the third different?

Reviewer debrief

The oath and witnessed signature are acts the notary performed or observed. The business claims remain the signer's sworn assertions. A jurat is not a guarantee of those claims; do not add that guarantee to the certificate.

4. Find the omitted step before the signer leaves (3 minutes)

Review a jurat as a sequence of distinct events. A common shortcut is to check ID, watch signing, and stamp while forgetting the oath. Another is to administer an oath over a previously signed document without new signing in the notary's presence. Both leave an element missing. A complete-looking form does not prove a complete act.

Before finishing, check that you can truthfully describe each event. If an error is discovered only after an act is completed, use the handbook's new-notarization procedure instead of creating a certificate for an oath or appearance that did not happen.

Participation exercise

Spend two minutes auditing this case: a signer appears, shows qualifying ID, signs, and leaves; the notary realizes no oath or affirmation was administered. Explain why a phone call later and a backdated certificate do not reproduce a complete properly conducted jurat.

Reviewer debrief

The oath was omitted from the encounter. Do not certify that it occurred, or use a later call to fabricate the original act. Arrange a new properly conducted notarization with the required appearance, oath/affirmation, witnessed signing, actual new date, and journal record.

Module scenario: Signed and identified, but not sworn

A client signs a declaration before the notary and provides acceptable ID, but declines to swear or affirm its truth.

Can the jurat be completed, and may the notary choose an acknowledgment instead?

Review point: The missing oath or affirmation prevents the jurat.

Review point: The notary cannot unilaterally choose a replacement legal act.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

Module quiz and correction | 8 minutes

II-B3-v2-Q1

A declaration already signed at home is presented for a requested jurat. What additional signing step is required?

A. The notary signs for the customer

B. No signing if the old signature matches ID

C. Only a journal signature

D. The signer must sign the document in the notary's presence

Answer: D. A jurat requires witnessed document signing. An earlier signature, comparison with ID, or journal signature does not satisfy that separate element.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q2

A signer objects to religious wording but agrees to attest to the statement's truth. What can the notary administer?

A. A statement by the signer's friend

B. An affirmation

C. An acknowledgment of the document date

D. A waiver of the oath requirement

Answer: B. An affirmation serves the required solemn purpose without religious wording. A waiver or another person's assurance does not replace the signer's participation.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q3

A signer cannot raise a hand but can communicate directly and affirm. What is correct?

A. Only an acknowledgment is possible

B. The affirmation may proceed without a raised hand

C. A jurat is unavailable without the gesture

D. Two witnesses must raise hands instead

Answer: B. A raised hand is traditional rather than mandatory. The necessary event is the actual oath or affirmation, alongside the other jurat requirements.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q4

The signer refuses both an oath and an affirmation. What should the notary do?

A. Decline to complete the jurat

B. Select an acknowledgment without instructions

C. Have the employer swear instead

D. Complete the jurat with a refusal note

Answer: A. The signer must take the oath or affirmation. A note, substitute speaker, or notary-selected change of legal act cannot cure its absence.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q5

Which statement would exceed the ordinary jurat's meaning?

A. The signer signed in the notary's presence

B. The notary guarantees the factual accuracy of the statement

C. The notary administered an affirmation

D. The signer appeared on the stated date

Answer: B. The jurat establishes the notarial encounter and oath, not independent proof of the statement's contents. The signer is responsible for the sworn assertions.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q6

A notary checked ID and witnessed signing but forgot the oath before completing the act. What is the sound response?

A. Mark the journal as though an oath occurred

B. Ask the receptionist to confirm the signer seemed honest

C. Arrange a new properly conducted notarization

D. Treat the printed word sworn as the oath

Answer: C. The omitted oath cannot be invented afterward. The handbook directs a new act meeting all requirements when a completed act contains an error.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q7

A requested California jurat has no boxed identity notice. What should the notary use?

A. The incomplete wording because the customer printed it

B. Only a seal beside the signature

C. An acknowledgment chosen by the notary

D. A compliant California jurat including the required notice

Answer: D. Use the required jurat form and notice. Customer-provided wording does not waive statutory requirements or authorize an unrequested change of act.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q8

A statement dated March 1 is signed and affirmed before the notary March 6. Which date belongs in the jurat?

A. March 6, the actual act date

B. Either date with the signer's consent

C. The date requested by the receiving agency

D. March 1, matching the statement

Answer: A. The jurat states when the notarial events occurred. Agreement, the underlying document date, and the commission start do not change those facts.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q9

A signer provides a birth certificate as the only identification for an ordinary jurat. Does section 8230 make that generally sufficient?

A. Yes, because age establishes identity

B. Yes, for every affidavit

C. No, its narrow age-verification rule does not replace general identity requirements

D. Yes, because any government-issued vital record is satisfactory identity evidence

Answer: C. Section 8230 concerns a specified identity statement and age verification. It is not blanket authorization to use a birth certificate alone as satisfactory signer ID.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B3-v2-Q10

A customer asks whether acknowledging an old signature supplies everything required for a jurat. What is the best explanation?

A. An acknowledgment is always legally stronger

B. A jurat does not require identification

C. A jurat additionally requires an oath or affirmation and signing in the notary's presence

D. The acts differ only in their maximum fee

Answer: C. The distinction is procedural and substantive, not a ranking of legal strength. A jurat requires identity, personal appearance, oath/affirmation, and witnessed signing.

Source: Government Code §§ 8202, 8206, 8230; Civil Code § 1185

II-B4: Types of Notary Public Acts and How to Perform the Acts | Proof of Execution by a Subscribing Witness

Subscribing-witness proof: use the narrow exception correctly

Screen the instrument, distinguish witness roles, and trace the required oaths and journal entries. 12 minutes of instruction and case work, then an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Screen the document before recruiting witnesses (3 minutes)

Proof of execution is a separate notarial act in which a subscribing witness appears to prove a principal's execution. It is not an acknowledgment falsely naming the absent principal as present. The document must be eligible for this procedure.

Do not use subscribing-witness proof for a power of attorney, ordinary grant or quitclaim deed, mortgage, deed of trust, security agreement, or other instrument within the statutory exclusions, including instruments requiring the signer's journal thumbprint. The law contains narrow exceptions for qualifying trustee's foreclosure deeds and deeds of reconveyance. Read the actual category; an ordinary grant deed does not acquire an exception because a client is hospitalized.

A witness's honesty, excellent identification, or relationship to the principal cannot cure an ineligible instrument. Screening the document first saves time and prevents an intricate but unauthorized ceremony.

Participation exercise

Use one minute to sort an ordinary grant deed, a power of attorney, and an otherwise eligible non-real-property agreement. Which can even be considered for proof, assuming no other exclusion?

Reviewer debrief

Only the otherwise eligible agreement can proceed to the witness screening. The ordinary grant deed and power of attorney are excluded regardless of convenience or the principal's inability to travel.

2. Establish the subscribing witness's knowledge (3 minutes)

The subscribing witness must personally know the principal and swear that the principal is the person described in the instrument. The witness must have seen the principal sign or have heard the principal acknowledge signing in the principal's presence. A telephone report from someone else that signing occurred is insufficient.

The principal must have requested that the subscribing witness sign the document as a witness, and the witness must have done so. These facts are part of the witness's sworn proof. Carrying an envelope or recognizing handwriting does not establish them.

Distinguish this witness from an identity witness. The subscribing witness supplies evidence of execution. A separate credible witness provides the required identity link to the notary. They have different knowledge and different statements to make.

Participation exercise

Spend two minutes drawing three people: principal, subscribing witness, credible witness. Under the subscribing witness, list four assertions needed about the principal and the signing. Then explain why a courier who only collected an envelope cannot fill that role.

Reviewer debrief

The witness knows the principal and can identify the principal as the named person; saw signing or heard acknowledgment in the principal's presence; was asked to sign as witness; and did sign. A courier without these facts cannot swear to the required execution history.

3. Use the required identity chain (3 minutes)

Civil Code section 1196 requires the subscribing witness's identity to be established through the oath of a credible witness personally known to the notary and personally acquainted with the subscribing witness. That credible witness must also present satisfactory documentary identification. The subscribing witness's own driver's license alone is not this prescribed method.

The credible witness must be disinterested as specified and swear to the required identity facts. Do not import the two-credible-witness alternative for ordinary signer identification into this special proof procedure. The identity chain here is specifically defined.

The subscribing witness signs the journal. The credible witness signs it or the notary records the specified documentary identification particulars. Complete the proof certificate, with its required notice and factual roles, instead of an acknowledgment claiming the principal appeared.

Participation exercise

Use two minutes to evaluate: the subscribing witness has a passport; a second person knows that witness but has never met you. Is the identity chain complete? What relationship and evidence are missing?

Reviewer debrief

No. The credible witness must be personally known to the notary as well as know the subscribing witness, and must present qualifying ID and take the oath. The subscribing witness's passport alone does not replace that chain.

4. Rehearse without merging the roles (3 minutes)

Before completing proof, recount each person's participation in plain language. The principal executed or acknowledged execution in the subscribing witness's presence and requested witnessing. The subscribing witness signed as requested and now swears to those facts before the notary. The credible witness meets the personal-knowledge, identification, and disinterest requirements and supplies sworn identity evidence.

If any link is absent, do not relabel an ordinary acknowledgment or omit a name to conceal the gap. The rarity of this act is a reason to consult the current statutory form and checklist before proceeding. It is not a reason to improvise a substitute certificate.

Participation exercise

Spend two minutes writing the sequence for the case below, beginning with instrument screening. Identify whose appearance the certificate can truthfully describe and whose journal signature is required.

Reviewer debrief

Screen the agreement, establish the credible witness's qualifying relationship and ID, administer that identity oath, take the subscribing witness's execution oath, obtain the subscribing witness's journal signature and the credible-witness signature or required ID record, and complete the proof certificate. Do not assert that the principal appeared.

Module scenario: A delivery is not proof

A courier brings an otherwise eligible agreement signed by an absent principal. The courier never saw signing or heard acknowledgment and was not asked to sign as a witness.

Does a courier's valid ID supply the missing execution facts?

Review point: No: the subscribing witness must have the required execution knowledge and sign at the principal's request.

Review point: Identity evidence cannot replace knowledge of execution.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

Module quiz and correction | 8 minutes

II-B4-v2-Q1

A hospitalized principal needs an ordinary grant deed notarized. May a subscribing witness bypass the principal's appearance for this document?

A. Yes, if the witness has a passport

B. No, this instrument is excluded from subscribing-witness proof

C. Yes, with two credible witnesses

D. Yes, if the hospital confirms admission

Answer: B. The ordinary grant deed is excluded. Travel difficulty and additional identification do not change the instrument restriction.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q2

A subscribing witness saw the principal sign but was never asked to sign as witness and did not do so. What is missing?

A. Only the witness's journal signature, which replaces document witnessing

B. Only the principal's written consent to the notary after the appointment

C. Nothing if the signature is recognizable

D. The requested subscription as witness

Answer: D. The principal's request and the witness's subscription are required execution facts. Observation alone does not complete the prescribed proof.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q3

How is the subscribing witness's identity established for this procedure?

A. By the oath of a qualifying credible witness personally known to the notary and identified by document

B. By the subscribing witness's license alone

C. By any two adults at the appointment

D. By the principal's emailed ID

Answer: A. Section 1196 specifies the credible-witness chain. The ordinary identification alternatives cannot simply be substituted for that special requirement.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q4

The principal signed before the witness arrived, then acknowledged the signature in the witness's presence and requested witnessing. Is earlier signing alone disqualifying?

A. No, even a third-party phone report suffices

B. Yes, unless the witness is a lawyer

C. Yes, the witness must always see pen touch paper

D. No, the prescribed acknowledgment in the principal's presence can supply that element

Answer: D. The witness may see signing or hear the principal acknowledge it in the principal's presence. A report from someone else is not the same evidence.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q5

Which certificate is appropriate after a lawful subscribing-witness proof?

A. A blank certificate for the principal to finish

B. A proof-of-execution certificate reflecting the witness roles

C. An acknowledgment saying the absent principal appeared

D. A jurat naming only the principal

Answer: B. Use the certificate for the act actually performed. Do not falsely recast an absent principal as a person who appeared before the notary.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q6

The proposed credible witness knows the subscribing witness but is a stranger to the notary. What is the problem?

A. The witness must also have personally observed the principal sign

B. A current passport alone would replace the personal-knowledge requirement

C. The required personal acquaintance with the notary is missing

D. Credible witnesses may never know subscribing witnesses

Answer: C. This procedure requires the credible witness to be personally known to the notary. A stronger ID does not supply a missing personal relationship.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q7

Which participant must sign the journal as the subscribing witness?

A. The person providing the sworn proof of execution

B. Only the person supplying identity evidence

C. The absent principal through a mailed signature

D. Only the courier who delivered the document

Answer: A. The subscribing witness signs the journal. The credible witness has a separate signature-or-identification-record requirement; the absent principal is not falsely recorded as appearing.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q8

A power of attorney is otherwise complete and the identity chain is perfect. Can subscribing-witness proof be used?

A. Yes, after obtaining the witness's thumbprint

B. Yes, if no fee is charged

C. No, the power-of-attorney exclusion still applies

D. Yes, if the credible witness signs twice

Answer: C. Witness qualifications cannot cure an excluded document. Collecting extra signatures or prints does not authorize the prohibited procedure.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q9

A courier recognizes the principal's handwriting but neither saw execution nor heard acknowledgment in the principal's presence. Is that enough?

A. Yes, if handwriting familiarity is longstanding

B. Yes, if the notary knows the courier

C. Yes, with an ID copy

D. No, recognition does not supply the required sworn execution facts

Answer: D. The statute specifies knowledge through the signing or acknowledgment encounter and requested witnessing. General signature familiarity is not equivalent.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B4-v2-Q10

What should a notary check first when a customer requests subscribing-witness proof?

A. Whether the principal signed a general waiver of personal appearance

B. Whether a witness can recognize the principal's signature from an earlier document

C. Whether the instrument is eligible for this act

D. Whether the subscribing witness has a driver's license, which alone qualifies every instrument

Answer: C. An excluded instrument ends the inquiry before witness logistics matter. Fees and signature resemblance cannot remove the statutory exclusion.

Source: Civil Code §§ 1195-1197; Code of Civil Procedure § 1935; Government Code §§ 8206, 27287

II-B5: Types of Notary Public Acts and How to Perform the Acts | Signature by Mark

Signature by mark: distinguish execution witnesses from identity witnesses

Apply the document and journal procedures without treating inability to write a conventional signature as inability to participate. 5 minutes of instruction and practice, then a 5-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Civil Code § 14; Handbook, Signature by Mark; Government Code § 8206; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Witness the mark and identify the signer (3 minutes)

A person unable to write a conventional signature may sign by mark. The signer still personally appears and is identified through satisfactory evidence. Two persons witness the mark on the document and sign their own names as witnesses; one writes the signer's name next to the mark. The acknowledgment or jurat must still be performed according to the requested act.

The two mark witnesses do not automatically establish the signer's identity. If acting only as witnesses to the mark, they need not be identified by the notary or sign the journal merely in that role. If they also serve as credible identity witnesses, all separate identity-witness conditions and journal duties apply. Count roles rather than just people. A disability does not authorize a companion to answer every question or make the mark for the signer.

Participation exercise

Use one minute to label the roles when an identified signer makes a mark witnessed by two friends. Which people supply document witness signatures, and does their presence eliminate the identity check?

Reviewer debrief

The two friends witness the mark and sign the document; one writes the signer's name adjacent to the mark. The signer's identity still must be established. They are not automatically credible identity witnesses merely because they witnessed execution.

2. Complete the journal mark separately (2 minutes)

The signer also places a mark in the journal. An individual witnesses that mark, writes the signer's name beside it, and signs as witness to the journal mark. Do not assume document witnessing supplies this separate journal step. Applicable thumbprint requirements remain in force.

Use a patient, direct explanation so the signer understands each step. An acknowledgment still requires acknowledgment of execution; a jurat still requires signing in the notary's presence and the oath or affirmation. Signature by mark is a method of signing, not a third choice that eliminates the selected notarial act.

Participation exercise

Spend one minute comparing the two locations of the mark. List what accompanies the document mark and what accompanies the journal mark before checking the debrief.

Reviewer debrief

Document: two witnesses sign, and one writes the signer's name by the mark. Journal: the signer's mark is witnessed by an individual who writes the signer's name beside it and signs as witness. Continue all other duties for the requested act, including any required print.

Module scenario: Witnesses with two different jobs

Two friends witness a mark on a power of attorney. The notary plans to skip signer identification because two people are present.

Which distinct requirement remains?

Review point: Witnessing a mark does not itself establish satisfactory evidence of identity.

Review point: The journal mark procedure and applicable thumbprint requirement still apply.

Source: Civil Code § 14; Handbook, Signature by Mark; Government Code § 8206

Module quiz and correction | 5 minutes

II-B5-v2-Q1

Two friends witness the signer's mark but have not been screened as credible identity witnesses. What has their presence established?

A. An exemption from the journal

B. Authority for either friend to take the oath

C. The signer's identity automatically

D. Only their role as witnesses to the mark

Answer: D. Mark witnessing and identity evidence are distinct. Presence of two friends does not satisfy the separate credible-witness conditions or replace the signer's participation.

Source: Civil Code § 14; Handbook, Signature by Mark; Government Code § 8206

II-B5-v2-Q2

What accompanies the mark on the document under the mark procedure?

A. One witness's verbal assurance only

B. Only the notary's initials

C. A fingerprint instead of witnesses

D. Two witnesses' signatures, with one writing the signer's name beside the mark

Answer: D. Two witnesses attest to the document mark and one writes the signer's name next to it. A seal, print, or oral assurance does not supply those steps.

Source: Civil Code § 14; Handbook, Signature by Mark; Government Code § 8206

II-B5-v2-Q3

The signer has marked the journal. What further journal-mark step is needed?

A. The two document witnesses must always supply photo ID

B. No further step because the document was witnessed

C. A witness writes the signer's name beside the mark and signs as witness

D. The notary copies a friend's signature

Answer: C. The journal mark must itself be witnessed with the written name and witness signature. Document witnessing does not automatically complete that distinct record.

Source: Civil Code § 14; Handbook, Signature by Mark; Government Code § 8206

II-B5-v2-Q4

A signer using a mark requests a jurat. Which requirements remain?

A. The friends may affirm for the signer

B. Personal appearance, identity, oath or affirmation, and signing by mark in the notary's presence

C. Only document witnesses are needed

D. Only a seal and date are needed

Answer: B. A mark changes the signature method, not the act's requirements. The signer must still participate in the jurat and meet the identification and oath conditions.

Source: Civil Code § 14; Handbook, Signature by Mark; Government Code § 8206

II-B5-v2-Q5

The document is a power of attorney executed by mark. Does the mark remove the applicable journal-print requirement?

A. No, the print rule and physical-inability provisions still apply

B. Yes, if two friends sign

C. Only if the notary charges a fee

D. Yes, the mark serves as the print

Answer: A. The signature method does not remove an independent print duty. Apply the ordinary required-print rule and genuine physical-inability alternatives.

Source: Civil Code § 14; Handbook, Signature by Mark; Government Code § 8206

II-B6: Types of Notary Public Acts and How to Perform the Acts | Certifying Copies

Copies: identify who is authorized to certify

Separate power-of-attorney copy certification, public-record copies, and a custodian's sworn statement. 5 minutes of instruction and practice, then a 5-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8205(a)(4), 8205(b)(1), 27201.1; Probate Code § 4307; Handbook, Certifying Copies; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Do not assume general copy-certification authority (3 minutes)

California notaries have specific authority to certify copies of powers of attorney under Probate Code section 4307. Examine the original and the copy, compare them, and certify that the copy is true and correct using appropriate wording, signature, and seal. A customer's assurance that the copy is accurate does not replace examination of the original. The notary also furnishes certified journal copies to the Secretary of State upon written request under section 8205.

This is not general authority to certify copies of diplomas, passports, birth certificates, or marriage records. Direct requests for official certified vital records to the appropriate records custodian. A requester's statement about a copy, if lawfully prepared and accompanied by a requested notarial act, remains the requester's statement; notarizing that person's signature does not turn it into the notary's certification of the underlying record. Do not promise that a recipient will accept such a statement as a substitute for an official certified copy.

For the authorized power-of-attorney copy certification in 2027, section 8205(a)(4) permits the notary's own handwritten or compliant electronic signature. Section 8205(b) governs the electronic form and security. The section 8211(e) maximum is $20. This does not expand the categories of documents the notary may certify.

Participation exercise

Use one minute to compare a power of attorney with its original available, a birth-certificate photocopy, and a diploma photocopy. Identify the statutory authority or appropriate referral rather than stamping all three alike.

Reviewer debrief

The original power of attorney can be compared for the specific certification. Obtain an official certified birth record from the authorized custodian. A notary has no general authority to certify the diploma copy; any separately requested act on a person's statement is different and acceptance must be determined by the recipient.

2. Understand tangible electronic-record certification (2 minutes)

Government Code section 27201.1 provides a specific route for a tangible copy of an electronic record for California real-property recording. A disinterested custodian makes the prescribed certification about accurate reproduction, access to the electronic record with intact tamper-evident procedures, absence of indicated changes or errors, and lack of direct benefit. The notary administers the oath or affirmation and completes the custodian's jurat.

Here the custodian certifies the reproduction; the notary notarizes that sworn statement. It does not authorize the notary to independently declare every printed electronic document a certified original, nor does it authorize remote appearance by the custodian under current California rules.

Participation exercise

Explain in one minute why a buyer who directly benefits from the recorded instrument cannot simply be treated as the disinterested custodian in this procedure.

Reviewer debrief

The statute's disinterest condition excludes a grantee, beneficiary, or other direct beneficiary. The notary must not treat a convenient available person as qualified without that condition. The custodian's certification and the notary's jurat remain separate roles.

Module scenario: Same printer, different authority

A client brings a power of attorney with its original and a birth-record photocopy and requests identical notary certifications.

Why does the type of record change the available service?

Review point: Power-of-attorney certification has specific statutory authority and requires comparison.

Review point: An official certified birth record must come from the proper custodian.

Source: Government Code §§ 8205(a)(4), 8205(b)(1), 27201.1; Probate Code § 4307; Handbook, Certifying Copies

Module quiz and correction | 5 minutes

II-B6-v2-Q1

A client brings only a photocopy of a power of attorney and asks the notary to certify its accuracy. What is missing?

A. The original notary's permission to make any copy

B. A second photocopy

C. A witness who recognizes the lawyer

D. The original needed for comparison

Answer: D. The notary must examine the original and copy to make this specific certification. Customer confidence or another copy does not supply the missing original.

Source: Government Code §§ 8205(a)(4), 8205(b)(1), 27201.1; Probate Code § 4307; Handbook, Certifying Copies

II-B6-v2-Q2

A customer asks a California notary to certify a birth-certificate copy as an official vital record. What should the notary do?

A. Direct the customer to the authorized records custodian

B. Use the power-of-attorney copy form

C. Certify it if the customer swears it is accurate

D. Stamp it without wording

Answer: A. The notary's limited copy authority does not create official vital-record certification power. A customer's oath does not transfer the custodian's authority.

Source: Government Code §§ 8205(a)(4), 8205(b)(1), 27201.1; Probate Code § 4307; Handbook, Certifying Copies

II-B6-v2-Q3

For the section 27201.1 tangible-copy procedure, who certifies the reproduction's accuracy?

A. Any named beneficiary without further conditions

B. The qualifying disinterested custodian in the sworn certification

C. The notary merely because a printer was used

D. The county clerk before the jurat

Answer: B. The custodian supplies the statutory assertions; the notary performs a jurat on that statement. These are distinct responsibilities.

Source: Government Code §§ 8205(a)(4), 8205(b)(1), 27201.1; Probate Code § 4307; Handbook, Certifying Copies

II-B6-v2-Q4

A notary performs a lawful jurat on a client's statement about a diploma copy. What has the notary certified?

A. That the notary has general copy-certification authority

B. That the university issued an authentic diploma

C. The jurat encounter, not the underlying diploma's authenticity

D. That every agency must accept the copy

Answer: C. Notarizing the client's sworn statement does not make the notary a certifier of the underlying credential or guarantee recipient acceptance.

Source: Government Code §§ 8205(a)(4), 8205(b)(1), 27201.1; Probate Code § 4307; Handbook, Certifying Copies

II-B6-v2-Q5

Which request fits the notary's specific direct copy-certification authority?

A. A power-of-attorney copy compared with its original under section 4307

B. Any document if the original owner consents

C. A passport photocopy for a visa office

D. A school transcript for an employer

Answer: A. Power-of-attorney copies have express statutory authority. Consent and possession of other originals do not create general certification power.

Source: Government Code §§ 8205(a)(4), 8205(b)(1), 27201.1; Probate Code § 4307; Handbook, Certifying Copies

II-B7: Types of Notary Public Acts and How to Perform the Acts | Immigration Documents

Immigration matters: keep each professional role separate

Distinguish notarization from form assistance, screen advertising, and apply the special data-entry fee rule. 7 minutes of instruction and case work, then a 6-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. A commission does not authorize immigration assistance (3 minutes)

There is no general prohibition on notarizing immigration-related documents. If the requested act is authorized and all requirements are satisfied, its immigration subject does not itself disqualify it. But a notary commission alone does not authorize entering client data on immigration forms, selecting immigration benefits, or advising which application to file.

Under section 8223, a notary must also be qualified and bonded as an immigration consultant to provide the covered data-entry service. The consultant role still does not authorize legal advice. Authorized attorneys and federally accredited representatives have separate legal authority; do not imply that a commission provides equivalent expertise. If your only qualification is the notary commission, decline form-assistance work outside it and refer the client to an appropriately authorized provider.

Participation exercise

Use one minute to classify three requests: a lawful jurat on a completed statement; typing the client's dictated answers into immigration forms while qualified only as a notary; recommending which immigration status to pursue.

Reviewer debrief

The jurat can proceed if all ordinary requirements are met. A commission alone does not authorize the covered data entry. Recommending legal status or strategy is legal advice requiring appropriate authority; the notary should refer rather than choose.

2. Review the message an advertisement conveys (2 minutes)

A non-attorney notary advertising notarial services in another language must include the prescribed notice in English and that language and list the statutory notarial fees. The notice must say the notary is not an attorney and cannot provide legal advice about immigration or other legal matters. Use the statutory wording when preparing an actual advertisement.

Section 8219.5 prohibits literal translation of Notary Public into Spanish as notario or notario publico even if the notice is present. Section 8223 separately bars advertising notary status when holding oneself out as an immigration specialist or consultant. A disclaimer does not cancel either prohibition. Review headlines, business names, online listings, and images, not merely fine print.

Participation exercise

Spend one minute auditing an ad headed 'Notario Publico - Immigration Specialist' with a small non-attorney disclaimer. Identify two problems that the disclaimer does not cure.

Reviewer debrief

The prohibited Spanish title remains prohibited. Promoting immigration expertise while advertising notary status also violates the separate restriction. The notice is a requirement for covered advertising, not a permission slip for misleading titles or role combinations.

3. Separate data-entry fees from notarial fees (2 minutes)

For a notary who is also qualified and bonded as an immigration consultant, section 8223 limits entering client-supplied data to $15 per individual for each set of forms. This is not $15 for every page. Additional lawful notarial fees under section 8211 may be collected for actual notarial services related to the set. An attorney-notary rendering professional immigration services has the specified exception.

State the service and unit clearly on an invoice. Do not use a single 'immigration certification' label that hides both unqualified advice and excessive charges. The service must be authorized before calculating its price; offering it free does not cure missing qualifications.

2027 distinction: AB 1597 changes the section 8211 notarial-service maximums, not the separate section 8223 $15 data-entry limit. Identify the service before applying a number.

Participation exercise

For one individual and one set of four forms, calculate the maximum covered data-entry fee before notarizations. Then explain why four pages do not produce four fees.

Reviewer debrief

The maximum covered data-entry charge is $15 for that individual and set. The unit is not each page. Any separate notarial charge must be tied to an actual authorized act and its own statutory limit.

Module scenario: A friendly request for help

A notary with no consultant qualification is asked to type immigration answers and select the most favorable category before notarizing a statement.

Which service can be evaluated as a notarial act and which requests exceed the commission?

Review point: Evaluate the statement's requested notarial act under ordinary rules.

Review point: Decline unqualified form assistance and legal selection; refer to an authorized provider.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

Module quiz and correction | 6 minutes

II-B7-v2-Q1

A completed immigration-related statement needs a lawful jurat. The notary is not an immigration consultant. What follows?

A. The notary must certify eligibility for the benefit

B. Every immigration-related notarization is prohibited

C. The subject alone does not prevent a lawful notarial act

D. The notary may also choose the immigration form

Answer: C. Notarization and immigration assistance are distinct. The subject does not bar a proper act or confer authority to select forms or certify benefit eligibility.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q2

A person qualified only as a notary offers to enter dictated answers on immigration forms for free. Is the lack of a fee decisive?

A. No, the separate qualification requirements still apply

B. Yes, free assistance needs no qualification

C. Yes, if answers are dictated

D. Yes, if the client signs a waiver

Answer: A. Section 8223 does not turn the commission into form-assistance authority when the fee is waived. Dictation and consent do not replace qualification.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q3

A covered Spanish-language notary advertisement uses 'notario publico' with a non-attorney notice. What is correct?

A. The prohibited translation remains impermissible

B. The notice cures the title

C. Only the font size matters

D. The title is allowed for unpaid services

Answer: A. The title prohibition is independent of the notice requirement. A disclaimer or free service does not permit that translation.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q4

A non-attorney notary advertises notarial services in another language. What additional content is required for covered advertising?

A. A disclaimer in English alone, regardless of the ad's language

B. The prescribed notice in English and that language and statutory fee listing

C. A translation of the commission title with no separate notice

D. A promise of successful document acceptance

Answer: B. The law requires the bilingual prescribed notice and fee information. A marketing promise or commission detail does not replace those disclosures.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q5

A qualified and bonded consultant-notary enters client data for one individual on one set of five forms. What is the maximum covered data-entry fee?

A. $15 per page plus $15 for the set

B. Any amount the client approves

C. $75 because there are five forms

D. $15 for the set

Answer: D. The section 8223 unit is per individual for each set, not each form or page. Consent does not raise the statutory limit.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q6

May a person promoting themself as an immigration specialist also advertise that they are a notary public?

A. Yes, with the general disclaimer

B. Yes, if the commission is current

C. No, section 8223 prohibits that advertising of notary status

D. Yes, if the titles appear on separate lines

Answer: C. This is a separate advertising restriction. Layout, a current commission, and a disclaimer do not remove it.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q7

A consultant-notary's client asks which immigration benefit provides the strongest legal chance. What is appropriate?

A. Choose the form with the lowest fee

B. Answer if the advice is free

C. Refer the legal question to an appropriately authorized professional

D. Choose the most common form

Answer: C. Consultant qualification and a commission do not authorize legal strategy advice. Frequency, cost, and waived fees are not substitutes for legal authority.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q8

A qualified consultant-notary performs lawful data entry and an actual notarization. How should the charges be assessed?

A. Charge one unitemized amount without statutory limits

B. The data-entry fee automatically covers unlimited notarizations

C. No separate notarial fee can ever be charged

D. Apply section 8223 to data entry and section 8211 to the actual notarial act

Answer: D. The statute allows additional notarial fees under section 8211. Separate service categories retain their own limits; neither creates an unlimited package price.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q9

A client calls the notary a legal expert because of the seal. What should the notary clarify?

A. The seal makes the notary a limited immigration attorney

B. The commission authorizes notarial acts, not general immigration advice

C. The title can be accepted if the client initiated it

D. The misunderstanding is cured by charging less

Answer: B. Clarify the actual scope of the commission. A customer's assumption and the presence of a seal cannot create legal-advice authority.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B7-v2-Q10

Which invoice description most accurately separates a lawful service from an unsupported promise?

A. Government eligibility verification

B. Jurat performed on the client's completed sworn statement

C. Guaranteed immigration approval

D. Legal status certified by notary

Answer: B. The last description identifies an actual notarial service. The other descriptions imply an approval or legal determination that the notarization does not establish.

Source: Government Code §§ 8219.5, 8223; Business and Professions Code §§ 22440-22449

II-B8: Types of Notary Public Acts and How to Perform the Acts | Protests, Depositions and Confidential Marriages

Special acts: verify the extra authority before accepting

Recognize the limits on protests, distinguish a deposition from a routine jurat, and separate marriage-license authorization from solemnization. 7 minutes of instruction and case work, then a 6-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. A protest is a specialized commercial act (2 minutes)

A protest documents dishonor of specified commercial instruments under the applicable law. It is not a notarized complaint or a way to make any unpaid invoice officially collectible. Government Code section 8205(a)(1) limits the described protest duties to a notary employed by a financial institution acting in the course and scope of that employment.

A commission by itself does not authorize a mobile notary to offer protests to every customer. Even an eligible employee must follow the applicable instrument, demand, and certificate requirements under section 8208 and Commercial Code section 3505. Establish your authority and obtain the institution's appropriate procedural guidance before accepting unfamiliar work.

Participation exercise

Explain in one minute why a freelance notary should not advertise a 'protest service' for ordinary overdue invoices solely on the strength of the commission.

Reviewer debrief

The statute requires qualifying financial-institution employment and action within that employment for these duties. An ordinary debt complaint is not automatically a commercial protest instrument. A commission and stamp alone establish neither the role nor the procedure.

2. A deposition involves its own procedural setting (2 minutes)

Government Code section 8205 authorizes taking depositions and administering oaths within the duties of office. A deposition is sworn testimony taken within a legal procedure, not just any signed letter. Identify the requested role, applicable procedure, and qualifications before accepting an assignment. Do not imply that being a notary automatically supplies every court-reporting credential or answers all deposition-procedure questions.

Section 8211(c) permits up to $35 for services in connection with taking a deposition, plus $12 for administering the witness oath and $12 for the certificate. Apply those components only to the actual services. A routine jurat does not become a $59 deposition merely because a customer calls a declaration 'testimony.'

Participation exercise

Calculate in one minute the maximum for all three stated deposition components, then explain why that amount does not apply to a routine affidavit jurat.

Reviewer debrief

The total is $59: $35 plus $12 plus $12. A routine jurat is governed by its own $20 limit; the actual service and procedural setting determine the category.

3. Confidential license issuance is not a wedding commission (3 minutes)

A notary seeking authority to issue confidential marriage licenses applies to the county clerk in the county of residence. County approval and the required instruction are additional conditions; the notary commission alone is insufficient. The county may or may not authorize the service. Consult that clerk rather than announcing the service on the assumption approval is automatic.

Issuing a license and solemnizing a marriage are different functions. To perform a marriage, a person must separately be authorized under Family Code sections 400-402. Approval to issue confidential licenses does not, by itself, confer that role. A customer who needs both services may therefore need providers with two distinct forms of authority.

When quoting a service, state the exact function you are qualified to perform. This prevents a common scope error: treating a certificate, oath, license, and ceremony as interchangeable because each involves official paperwork.

Participation exercise

Use two minutes to build an authority checklist for a notary asked to issue a confidential license and perform the ceremony tomorrow. Name the approving authority and separate qualification to verify; draft a response if neither has been established.

Reviewer debrief

Check county-of-residence clerk approval and completed instruction for license issuance. Separately check authority under Family Code sections 400-402 to solemnize. Without the needed authority, decline those services and direct the couple to the county or an authorized provider; do not promise that the commission alone covers both.

Module scenario: One commission, three different requests

A mobile notary is asked to protest an unpaid invoice, conduct a deposition, and issue a confidential marriage license.

What must be verified before treating any of these as an ordinary stamp appointment?

Review point: Protest authority has the financial-institution employment limitation.

Review point: Deposition duties require the proper procedural role; marriage licensing requires separate county approval.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

Module quiz and correction | 6 minutes

II-B8-v2-Q1

A freelance notary is asked to perform a protest under section 8205(a)(1). Which qualification is missing from the facts?

A. Prior experience presenting unpaid instruments, regardless of employer

B. Written authorization from the creditor, regardless of employer

C. Qualifying financial-institution employment and action within that employment

D. A customer's written waiver

Answer: C. The statute limits these protest duties by employment and scope. More supplies, a larger bond, or consent cannot supply the required role.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-v2-Q2

A bank-employed notary is offered an unrelated private protest assignment outside that employment. Does employment alone settle authority?

A. Yes, if the creditor authorizes the private assignment in writing

B. Yes, if the instrument was originally issued by that bank

C. No, the act must also be in the course and scope of that employment

D. Yes, bank employment authorizes all private protests

Answer: C. Both employment and scope matter. A personal side assignment does not automatically fall within the statutory authorization.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-2027-Q3

In January 2027: All three section 8211(c) deposition services are performed: taking the deposition, the witness oath, and the certificate. What is the maximum total?

A. $20

B. $35

C. $37

D. $59

Answer: D. The stated components total $35 + $12 + $12 = $59. The question includes all three; the ordinary jurat maximum is a different category.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530; AB 1597 sec. 2, GC 8211(c).

II-B8-v2-Q4

A client calls a routine sworn declaration a deposition to justify a $44 charge. What determines the fee category?

A. Whether the paper is later shown to a lawyer

B. The client's preferred label

C. The actual service performed under the applicable rule

D. The number of pages alone

Answer: C. A label does not transform a routine jurat into deposition services. Identify the actual act and apply its statutory limit.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-v2-Q5

A commissioned notary wants to issue confidential marriage licenses. Whose additional approval is relevant?

A. The county clerk in the notary's county of residence

B. The education vendor alone

C. The Secretary of State through ordinary commission issuance

D. The county recorder through acceptance of a recorded deed

Answer: A. The county clerk's approval and required instruction are additional conditions. The commission, vendor, or venue does not supply them.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-v2-Q6

A notary is approved to issue confidential marriage licenses. Does that alone authorize performing the ceremony?

A. Yes, the license automatically authorizes its issuer

B. Yes, if both applicants consent

C. Yes, when no ceremony fee is charged

D. No, solemnization requires separate authority under the Family Code

Answer: D. License issuance and solemnization are distinct functions. Consent or free service does not replace the separate statutory authority.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-v2-Q7

A customer asks a notary to stamp an overdue invoice as a commercial protest. What is the best initial assessment?

A. Verify the instrument, statutory procedure, and notary's qualifying role

B. Every unpaid debt can use the procedure

C. A jurat stamp is sufficient

D. A second witness makes it a protest

Answer: A. A commercial protest is a specialized act. Neither nonpayment alone nor a generic stamp establishes that the instrument and notary qualify.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-v2-Q8

A notary is offered a deposition assignment outside their procedural experience. What should happen before accepting?

A. Use a routine acknowledgment for every statement

B. Ask the witness to sign a waiver of procedure

C. Accept because the commission supplies all court-reporting credentials

D. Verify the requested role, governing procedure, and needed qualifications

Answer: D. The commission's oath authority does not resolve every deposition or reporting requirement. Verify the role rather than substitute another act or a waiver.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-v2-Q9

A county has not approved a notary to issue confidential marriage licenses. The notary completed ordinary six-hour education. What follows?

A. The notary can issue one license as a trial

B. Ordinary education does not substitute for county authorization

C. A certificate from any wedding officiant supplies the approval

D. Course completion supplies county approval

Answer: B. The county authorization and instruction are separate from ordinary appointment education. Neither supplies an automatic waiver of the other.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-B8-v2-Q10

Which customer explanation accurately separates authority?

A. Confidentiality removes the need for county approval

B. I must verify license-issuance approval and ceremony authority separately

C. My commission covers every service involving an oath

D. The couple's consent lets me perform either function

Answer: B. The two functions have distinct legal requirements. Neither broad oath authority, consent, nor confidentiality collapses them into a single service.

Source: Government Code §§ 8205(a)(1), 8205(a)(3), 8208, 8211(c); Commercial Code § 3505; Family Code §§ 400-402, 530

II-C: Fees

Fees: calculate the lawful charge and show the service

Apply per-signature and per-service limits, recognize mandatory free acts, and audit an itemized invoice. 11 minutes of reading and calculation practice, then an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Identify the unit before multiplying (3 minutes)

For acts on or after January 1, 2027, apply AB 1597, Chapter 39, section 2. For an acknowledgment or proof, section 8211 allows up to $20 per signature taken, including the certificate and seal. For administering the oath or affirmation and executing a jurat, the maximum is $20 per person. A power-of-attorney copy certification is capped at $20. Pages are not the unit for these services.

For a deposition, the authorized components are $35 for the services in connection with taking it, plus $12 for the witness oath and $12 for the certificate. Do not bill a routine jurat as deposition services. The ordinary maximum can be reduced or waived when no mandatory charging rule applies, but the actual fee - including zero - must be recorded.

Start an invoice with the act, the legally relevant quantity, the maximum, and the actual charge. This makes it possible to detect an overcharge before collecting payment. A seal and certificate already included in the statutory act cannot be sold as add-ons to evade its cap.

Participation exercise

Use two minutes to calculate: three acknowledged signatures on one instrument; one person's jurat on a ten-page declaration; one certified power-of-attorney copy. Then compare the respective maximums with a proposal to charge $20 per page.

Reviewer debrief

The maximums are $60, $20, and $20. The count of pages is not the fee unit for these acts. Certificate and seal work included in an act cannot be stacked as extra notarial charges.

2. Check the mandatory no-fee categories (3 minutes)

Some acts have no-fee rules, not merely permission to offer a discount. Section 8211 bars fees for notarizing signatures on vote-by-mail ballot identification envelopes or other voting materials. Section 6107 covers specified applications or claims by U.S. military veterans for pensions, allotments, allowances, compensation, insurance, or other veteran benefits. A veteran's unrelated commercial document is not automatically in that category.

Other specified exceptions include nomination documents and circulator affidavits under Elections Code section 8080, covered pension-related work by public-entity notaries under section 6106, and services by the specially appointed military-reservation notaries under section 8203.6. Public-agency notaries also have specific charging and remittance rules under section 6100, subject to applicable exceptions. Do not confuse a voluntary private discount with a statutory fee exemption.

Participation exercise

Use two minutes to sort a vote-by-mail signature, a veteran's benefit claim, and that veteran's unrelated business lease acknowledgment. Explain which facts determine a mandatory zero notarial fee and record what the journal should say.

Reviewer debrief

The voting material and covered veteran-benefit claim have zero notarial fees. Veteran status alone does not exempt the unrelated lease. Record the actual notarial charge, including zero; free acts still require the journal.

3. Keep ancillary charges and record requests distinct (2 minutes)

If travel is charged, identify it separately from the notarial fee and disclose the arrangement in advance. Do not label an excessive charge for the act 'travel' after the fact to hide an overcharge. The handbook directs separate identification of travel fees; it does not make every renamed surcharge lawful.

A public journal line-item copy has its own maximum of $0.30 per page, not the $20 act fee. Covered immigration-form data entry by a properly qualified consultant-notary has its own $15-per-individual-per-set rule. Ask what service is being purchased before borrowing an amount from another category.

Participation exercise

In January 2027, Phil quotes John $75: two acknowledged signatures at $20 each and $35 genuinely agreed travel. Itemize the invoice and identify the actual notarial fee to record.

Reviewer debrief

Acknowledgments $40; travel $35 separately identified. Record the actual notarial fees, with travel distinct. Agreement cannot justify an excessive notarial fee.

4. Audit a quote before collecting payment (3 minutes)

A good fee explanation identifies the service, the number of signatures or people, any mandatory exemption, and any separate agreed service. Calculate before the encounter becomes rushed. If a quote is wrong, correct it rather than proceeding because the customer initially agreed. Consent does not increase a statutory maximum.

A private notary who chooses to charge less should still make the record clear. For a no-fee act, write zero or no fee rather than leaving an ambiguous blank. Do not treat a tip demanded as a condition of the act as a way around the ceiling. The legal character of the charge matters more than its label.

Participation exercise

Use two minutes to audit: one person's jurat is quoted at $20 plus $5 for the included seal, an acknowledged two-signature instrument at $40, and a two-page public journal copy at $20. Identify each incorrect line, replace it with the applicable maximum, and explain the unit.

Reviewer debrief

The jurat including its seal is at most $20, not the quoted $25. Two acknowledged signatures may total $40. Two journal-copy pages are at most $0.60. The units differ; page count does not set the acknowledgment or jurat fee.

Module scenario: Consent does not raise the maximum

In January 2027, John agrees to pay Phil $25 for one jurat because Phil lists $20 for the oath and $5 for the included seal. John says his agreement makes the surcharge legal.

Is the extra charge a distinct permitted service?

Review point: The seal is included in the jurat's statutory fee.

Review point: Correct the quote; customer agreement does not increase the maximum.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080

Module quiz and correction | 8 minutes

II-C-2027-Q1

On January 4, 2027, John and his three brothers sign a deed. Only John appears before Phil and acknowledges his signature. Assuming all other requirements are met, whose acknowledgment may Phil take and what is the maximum fee for that act?

A. All four signatures for $80

B. John's signature only, up to $20

C. John's signature only, up to $60

D. All signatures for $20 because there is one document

Answer: B. Only John's personal appearance supports his acknowledgment. The other brothers' signatures cannot be acknowledged through John. The maximum is $20 for the one signature actually taken, not a charge for every signature printed on the deed.

Source: GC 8211(a), AB 1597 sec. 2; Civil Code 1189; GC 8205(a)(2).

II-C-2027-Q2

For an act in January 2027: One signer takes a jurat on a 12-page declaration. What is the maximum fee for that jurat, including the seal?

A. $20

B. $30

C. $240

D. $20 plus a separate seal fee

Answer: A. The jurat maximum for one person is $20 including the seal. Neither page count nor splitting included components permits a higher notarial charge.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q3

For an act in January 2027: A customer asks for notarization of a vote-by-mail ballot identification envelope signature. What notarial fee is permitted?

A. Up to $7

B. Any amount if agreed

C. $0

D. Up to $20

Answer: C. The statute expressly prohibits a notarial fee for covered voting materials. Customer agreement does not waive the no-fee rule.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q4

For an act in January 2027: A U.S. veteran requests notarization of a claim for veterans' benefits. What is the applicable notarial charge?

A. Half the ordinary fee

B. No fee for the covered benefit claim

C. The ordinary fee unless the veteran requests a waiver

D. $20 per page

Answer: B. The covered benefit claim falls within the statutory no-fee provision. It is not merely a discretionary discount requiring a special request.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q5

For an act in January 2027: A veteran presents an unrelated business lease for acknowledgment. What does veteran status alone establish about fees?

A. It does not by itself place the lease in the benefit-claim exemption

B. Only travel may be charged for any document

C. Every service must be free

D. The maximum doubles

Answer: A. The exemption concerns the specified benefit applications and claims, not every document signed by a veteran. Analyze the document's purpose.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q6

For an act in January 2027: A private notary lawfully waives the fee for an ordinary act. How should the fee field be completed?

A. Leave it blank

B. Record the maximum even though it was waived

C. Omit the entire journal entry

D. Record zero or no fee

Answer: D. The journal records the actual fee, including zero. Free service does not remove the duty to record the act and fee accurately.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q7

For an act in January 2027: A notary charges $20 for a jurat plus $5 for its included seal impression. What is the issue?

A. Only cash payments are restricted

B. Splitting an included component exceeds the $20 limit

C. The surcharge is allowed if printed on an invoice

D. The client can waive the cap

Answer: B. The seal is included in the jurat fee. Itemization, consent, and payment method do not raise the statutory ceiling.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q8

For an act in January 2027: Two acknowledged signatures cost $30 and genuinely agreed travel costs $25. Which description best records the charges?

A. Acknowledgments $30; travel $25 separately identified

B. Seal fee $25; signatures free

C. Journal fee $55

D. Notarial fee $55

Answer: A. Identify the actual notarial amount and travel separately. Relabeling the entire price as the act or its included tools obscures the statutory charge.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q9

For an act in January 2027: A qualifying public request requires three pages of journal line-item copies. What is the maximum copy charge?

A. $60

B. $0.30

C. $3

D. $0.90

Answer: D. The copy maximum is $0.30 per page, so three pages total $0.90. The $20 notarial-act fee is not the journal-copy fee.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

II-C-2027-Q10

For an act in January 2027: An ordinary acknowledgment quote exceeds the statutory maximum, but the customer agreed in advance. What should the notary do?

A. Call the excess a mandatory tip

B. Leave the excess out of the journal

C. Correct the notarial charge to a lawful amount

D. Collect it because consent controls

Answer: C. Agreement cannot raise a statutory cap. Renaming or concealing the excess does not change the charge's substance.

Source: Government Code §§ 6100, 6106-6107, 8203.6, 8206, 8206.5, 8211, 8223; Elections Code § 8080; GC 8211 as amended by AB 1597, Ch. 39, Stats. 2026, sec. 2 (January 1, 2027).

III-A: Conflict of Interest

Conflicts: identify your interest in the transaction

Distinguish a direct personal interest from acting as an employee, and identify when another notary is required. 5 minutes of instruction and case work, then a 5-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8224-8224.1; Handbook, Conflict of Interest; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Look for the notary as an individual party (3 minutes)

A notary with a direct financial or beneficial interest in a transaction must not perform a notarial act connected with it. For a financial transaction, section 8224 includes being individually named as a principal. For real property, the listed individual roles include grantor, grantee, mortgagor, mortgagee, trustor, trustee, beneficiary, vendor, vendee, lessor, and lessee. Read who is named and in what capacity instead of asking only whether you expect a notarial fee.

The statute distinguishes acting as an agent, employee, insurer, attorney, escrow holder, or lender for a person who has the direct interest. Employment by an interested business does not automatically make the notary individually a principal. It also does not protect a notary who separately has the prohibited personal role.

Under section 8224.1, a notary must not take the acknowledgment or proof of the notary's own instrument or take the notary's own deposition or affidavit. Identification by another person does not turn self-notarization into an independent act.

Participation exercise

Spend one minute comparing a notary named individually as buyer in a deed with an employee notarizing a customer's document for the employer. Identify the decisive fact, not merely who pays the salary or fee.

Reviewer debrief

The individual buyer has the prohibited direct real-property interest. Employment alone falls within the statute's distinction and does not establish that same personal interest. Still screen the employee for a separate individual role and all other requirements.

2. Handle family requests without a blanket shortcut (2 minutes)

California does not categorically prohibit every notarization for a relative. The direct financial or beneficial interest test still applies. A spouse or domestic partner may raise community-property concerns; do not assume separate names on the document eliminate your interest. If you cannot resolve the conflict question, seek legal guidance and use a disinterested notary rather than guessing.

Waiving the fee does not remove an ownership interest. The signer's consent likewise cannot authorize an act the statute prohibits. A useful refusal identifies your role in the transaction without giving advice on whether the underlying contract is valid.

Participation exercise

Use one minute to explain why 'I will notarize my own lease as lessee for free' still fails, and why 'the signer is my cousin' does not by itself answer the conflict question.

Reviewer debrief

The notary's individual lessee role is a listed direct interest, regardless of fee. Kinship alone is not the statutory disqualification; examine the actual interest. Neither a free service nor a blanket ban on all relatives applies the rule accurately.

Module scenario: No fee, but a personal benefit

A notary is individually named as grantee in a deed and offers to notarize the grantor's signature without charge.

Does the absence of a fee remove the conflict?

Review point: The personal grantee interest is the disqualifying fact.

Review point: Use a different, disinterested notary; consent and free service do not cure it.

Source: Government Code §§ 8224-8224.1; Handbook, Conflict of Interest

Module quiz and correction | 5 minutes

III-A-v2-Q1

A notary is individually named as grantee in a deed. Can the notary acknowledge the grantor's signature for free?

A. No, the individual grantee interest disqualifies the notary

B. Yes, if a witness attends

C. Yes, because the notary is not the signer

D. Yes, if the grantor consents

Answer: A. The statutory conflict concerns the notary's direct interest, not just whose signature is taken. Waiving a fee or adding a witness does not remove that interest.

Source: Government Code §§ 8224-8224.1; Handbook, Conflict of Interest

III-A-v2-Q2

A notary acts only as an employee for an interested company and is not individually a party. What follows from employment alone?

A. It authorizes notarizing the employee's own affidavit

B. It removes all need for conflict screening

C. It does not itself create the listed direct personal interest

D. It prohibits every company-related notarization

Answer: C. Section 8224 distinguishes the employee capacity. That distinction is not permission for self-notarization or a reason to ignore a separate personal interest.

Source: Government Code §§ 8224-8224.1; Handbook, Conflict of Interest

III-A-v2-Q3

A cousin asks for an acknowledgment on an unrelated transaction in which the notary has no direct interest. What is correct?

A. The notary must charge no fee

B. Kinship alone does not bar the act; ordinary requirements still apply

C. All family notarizations are prohibited

D. Family relationship replaces identification

Answer: B. California's rule turns on the prohibited interest, not every family relationship. Identity and other duties remain unchanged.

Source: Government Code §§ 8224-8224.1; Handbook, Conflict of Interest

III-A-v2-Q4

A notary cannot determine whether a spouse's transaction gives the notary a community-property interest. What is the prudent response?

A. Proceed if the spouse waives liability

B. Charge no fee to remove the interest

C. Assume different names eliminate the issue

D. Seek legal guidance and use a disinterested notary rather than guess

Answer: D. Unresolved personal-interest questions are not cured by consent or a waived fee. A separate notary avoids acting while the conflict is unresolved.

Source: Government Code §§ 8224-8224.1; Handbook, Conflict of Interest

III-A-v2-Q5

A notary signs an affidavit and asks a coworker to check ID while the notary completes the notary's own jurat. What is the defect?

A. The notary cannot take the notary's own affidavit

B. The affidavit merely needs an acknowledgment instead

C. The coworker's ID check makes the act independent

D. A second journal signature removes the conflict

Answer: A. Section 8224.1 prohibits the self-act. Having a coworker check identity or changing the act label does not create an independent authorized notarization.

Source: Government Code §§ 8224-8224.1; Handbook, Conflict of Interest

III-B: Giving Legal Advice/Practicing Law

Legal advice: explain the procedure without choosing the legal result

Recognize document-selection and legal-advice requests, give useful procedural explanations, and refer unresolved legal decisions. 5 minutes of instruction and practice, then a 5-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Business and Professions Code § 6125; Government Code §§ 8214.1(g), 8219.5, 8223; Handbook, Acts Constituting the Practice of Law; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Distinguish explanation from recommendation (3 minutes)

A non-attorney notary may explain what happens during an acknowledgment or jurat. The notary must not decide which legal document a customer should use, draft the customer's legal terms, or recommend the notarial act needed to accomplish a legal goal. Knowing a familiar form does not create authority to select it.

Compare two responses. 'A jurat requires an oath or affirmation and signing before me' explains procedure. 'Use a jurat because it gives your claim stronger legal effect' recommends a legal course. The second crosses the boundary even if no extra fee is charged. Likewise, reading a document for completeness is not permission to fill missing ownership shares or choose beneficiaries.

When the document lacks instructions, ask the customer to obtain the needed choice from the receiving party or legal adviser. You can still explain scheduling, identification, fees, and participation requirements. A helpful referral keeps the service moving without guessing the customer's legal needs.

Participation exercise

Use one minute to rewrite: 'You should use a quitclaim deed and an acknowledgment; that will protect your share.' Preserve useful assistance while removing document selection and the promised legal result.

Reviewer debrief

Explain that you can perform a properly requested lawful notarial act and describe its participation requirements. Refer the choice of deed and its effect on ownership to an attorney, and ask the customer to return with the completed document and selected act. Do not promise protection of an ownership share.

2. Do not let disclaimers disguise unauthorized work (2 minutes)

Saying 'I am not a lawyer' does not make the next sentence of legal advice permissible. The substance of the service controls. Choosing immigration status, drafting a power of attorney, or interpreting who owns property remains legal work even if described as typing or customer service.

Titles and advertisements also matter. A non-attorney must not suggest legal expertise through prohibited translations or misleading claims. For covered foreign-language advertising, use the prescribed notice and fee disclosures; those disclosures do not authorize the underlying prohibited service.

Participation exercise

Spend one minute classifying: explaining acceptable ID; recommending how to transfer property; explaining the oath in a requested jurat; filling a missing legal ownership percentage. Identify which requests need referral.

Reviewer debrief

ID information and explaining the oath are procedural assistance. Recommending a property transfer and supplying ownership terms are legal decisions outside a non-attorney notary's role and need appropriate referral.

Module scenario: The familiar form

A customer asks a non-attorney notary to select a power-of-attorney form because the notary sees these documents every day.

How can experience support service without becoming unauthorized selection?

Review point: Explain the notarial procedure and what the signer must bring.

Review point: Refer document choice and legal effect to an attorney; familiarity is not authority.

Source: Business and Professions Code § 6125; Government Code §§ 8214.1(g), 8219.5, 8223; Handbook, Acts Constituting the Practice of Law

Module quiz and correction | 5 minutes

III-B-v2-Q1

A customer asks which deed best protects an ownership interest. What can a non-attorney notary appropriately do?

A. Choose the deed most often seen

B. Refer the legal choice and explain available notarial procedures

C. Choose if no drafting fee is charged

D. Select an act first and let that determine the deed

Answer: B. Legal effect and document selection require appropriate advice. The notary can explain procedure without choosing how the customer's property interests should be arranged.

Source: Business and Professions Code § 6125; Government Code §§ 8214.1(g), 8219.5, 8223; Handbook, Acts Constituting the Practice of Law

III-B-v2-Q2

Which statement stays within procedural explanation?

A. A jurat requires your oath or affirmation and signing before me

B. This deed prevents future claims

C. A jurat gives your case stronger legal rights

D. You should appoint this person as agent

Answer: A. Describing the act's participation requirements is procedural. The other statements recommend legal choices or promise legal effects.

Source: Business and Professions Code § 6125; Government Code §§ 8214.1(g), 8219.5, 8223; Handbook, Acts Constituting the Practice of Law

III-B-v2-Q3

A notary says 'I am not an attorney' and then drafts a client's legal power-of-attorney terms. What controls?

A. A signed waiver transfers responsibility

B. The substance of drafting remains outside the non-attorney role

C. The disclaimer authorizes the service

D. A free service cannot be unauthorized practice

Answer: B. A disclaimer does not authorize legal drafting. Neither fee waiver nor customer consent expands the notary's professional authority.

Source: Business and Professions Code § 6125; Government Code §§ 8214.1(g), 8219.5, 8223; Handbook, Acts Constituting the Practice of Law

III-B-v2-Q4

A document is missing an ownership percentage. What should the non-attorney notary do?

A. Notarize first and let the recipient add it

B. Insert equal shares as the usual default

C. Copy a percentage from a prior customer's form

D. Have the responsible party obtain and complete the needed legal information

Answer: D. The notary should not supply legal terms or notarize a substantively incomplete instrument. Completion by the appropriate party must precede the act.

Source: Business and Professions Code § 6125; Government Code §§ 8214.1(g), 8219.5, 8223; Handbook, Acts Constituting the Practice of Law

III-B-v2-Q5

A completed document has no notarial instructions. Which next step avoids selecting the act for the customer?

A. Stamp the document with no certificate

B. Use an acknowledgment by default

C. Ask the customer to obtain the needed choice from the recipient or legal adviser

D. Use both acts to cover every possibility

Answer: C. Obtain a properly selected act rather than guessing or performing extra acts as a substitute for instructions. A stamp alone is not a notarial certificate.

Source: Business and Professions Code § 6125; Government Code §§ 8214.1(g), 8219.5, 8223; Handbook, Acts Constituting the Practice of Law

III-C: Reasons for Commission Revocation or Suspension, or Application Denial

Discipline: connect the failed duty to the conduct

Recognize grounds for denial, suspension, and revocation; preserve records and understand that multiple consequences can coexist. 14 minutes of instruction and case work, then an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval. 2027 amendment review prepared October 28, 2026: AB 1597 (Ch. 39), AB 1828 (Ch. 275), AB 1977 (Ch. 280), Stats. 2026, as applicable. See the change map for exact sections and operative dates. Unchanged handbook material retains its earlier source-review status.

1. Trace the duty instead of waiting for a criminal charge (4 minutes)

Section 8214.1 authorizes the Secretary of State to refuse appointment or suspend or revoke a commission on specified grounds. These include material application misstatements or omissions, qualifying convictions, certain other professional-license discipline, failures of notarial duty, false or misleading advertising, unauthorized legal practice, overcharging, and knowingly false certificates. A conviction is not a prerequisite for every kind of administrative action.

Negligent performance can matter even without a deliberate fraud plan. Leaving official tools unsecured, failing to finish the certificate when signing and sealing it, or omitting an oath does not become acceptable because the customer suffered no immediate loss. Analyze the duty and the conduct before discussing outcome or motive.

For an application issue, determine what fact was misstated or omitted and why it was material. Do not promise that an omission is harmless merely because the background check might reveal the truth. Accurate disclosure is the applicant's own responsibility.

2027 discipline update - AB 1977 section 6: Section 8214.1 addresses refusal to appoint, suspension or revocation. Its security grounds now cross-reference journal obligations in section 8206 or 8231.5(d), seal security in section 8207, and willful failure to report journal theft/loss under the applicable provision. Added grounds reference violations of sections 8231.5 and 8231.6, noncompliant online systems or depositories under section 8231.14, and additional specified acts. Apply future online-related duties only when the governing framework is operative and applicable. The electronic-seal and signature security duties introduced in 2027 must not be confused with remote authorization.

Identify the actor and duty first: a notary sharing an electronic seal violates their own security duty; a principal asking for an unlawful shortcut does not make the resulting act lawful; a platform business may have separate duties under section 8231.18. A disciplinary ground is not by itself a declaration of a felony, misdemeanor or a particular dollar fine. Analyze the separate criminal or civil statute and its required facts. These amendments do not automatically reclassify every journal or seal error as a felony.

Participation exercise

Spend two minutes pairing conduct with duties: a material conviction omitted from an application; a jurat completed without an oath; and a seal kept in an unlocked shared drawer. For each, explain why 'no complaint yet' does not resolve the issue.

Reviewer debrief

The application must be accurate, the jurat must include the oath or affirmation, and the seal must be secured under exclusive control. Each is an independent obligation. The absence of a complaint or demonstrated loss does not establish compliance.

2. Separate deliberate falsehood from an unresolved error (4 minutes)

Knowingly signing a certificate with false facts is a serious independent ground. Pressure to meet a deadline is not a defense to certifying an appearance on a day when it did not occur. A journal with the real date does not neutralize a false certificate. Nor can a customer accept responsibility for a statement the notary makes under official authority.

If a mistake is discovered, preserve the original facts and use the lawful new-notarization process described in the handbook. Never rewrite records to create a more favorable history. Record preservation helps distinguish what happened from what someone later wished had happened.

Section 8214.1 also addresses dishonesty, fraud, or deceit intended to substantially benefit the notary or another or substantially injure another. Personal profit is not the only relevant motive. Helping a manager or client obtain an improper benefit can create the same type of concern.

Participation exercise

Use two minutes to draft a refusal to a manager asking you to backdate a certificate by two days. Then write the factual note you would preserve about the request, without inventing a completed act or accusing anyone beyond the facts known.

Reviewer debrief

Decline because the certificate must state the actual encounter date. Explain that urgency cannot change that fact. Preserve an accurate account of the request and your response; do not create a false certificate or journal entry to make the transaction appear completed.

3. Cooperate with official requests while protecting records (3 minutes)

The Secretary of State may request certified journal copies and information about official acts. Section 8205 requires the specified written information request to be answered within 30 days of receipt. Failure to furnish required information can support discipline. The notary remains responsible after changing employers.

Journal exclusivity is not a blanket right to refuse authorized official access. Section 8206 sets the circumstances and procedures for peace-officer access, seizure, court-ordered examination, and employer-related inspection. Verify the request's authority, preserve unrelated privacy appropriately, and follow the applicable procedure. Do not confuse a member of the public's line-item request with an officer's authorized investigation.

Resignation or expiration does not necessarily end an investigation or disciplinary proceeding. Section 8214.4 addresses misconduct discovered after service ends. Preserve and deliver records as required instead of assuming that leaving office makes them irrelevant.

Participation exercise

Spend one minute explaining why these two statements are wrong: 'The journal is mine, so no official may access it' and 'I resigned, so the state cannot examine what I did.'

Reviewer debrief

Exclusive control protects the record from unauthorized access, but statutory official access still applies. Resignation does not erase earlier conduct or end the state's statutory investigative and disciplinary authority.

4. Understand the process without predicting its result (3 minutes)

Denial concerns appointment; suspension interrupts authority; revocation withdraws the commission. A civil monetary penalty and a criminal proceeding serve different purposes and may accompany administrative action. Do not tell a learner that paying a fine automatically restores a commission or that one consequence rules out another.

Section 8214.3 provides hearing rights subject to its stated exceptions. Actual notice and procedure matter; a course scenario is not a finding that a particular person will receive a fixed sanction. Section 8219.5 also has specific consequences for covered advertising violations: a first offense is grounds for suspension or revocation and a second for permanent revocation. Treat repeated violations as substantive, not merely repeated paperwork.

Participation exercise

Use two minutes to write a case assessment for a notary who overcharged and omitted an oath, then resigned when a complaint arrived. Identify possible administrative issues, records to preserve, and why the final sanction cannot be inferred solely from this short account.

Reviewer debrief

Overcharging and the omitted oath are specified grounds. Preserve the actual journal, certificate information, communications, and fee records and comply with official requests. Resignation does not erase the conduct. The statutory process, full facts, and applicable standards determine the sanction; do not promise either automatic revocation or immunity.

Module scenario: No loss does not mean no violation

A notary routinely skips oaths on jurats and argues that all clients were honest and nobody lost money.

Identify the failed duty and explain why the claimed outcome does not establish compliance.

Review point: The required oath or affirmation was omitted.

Review point: Administrative grounds are not limited to cases with proven financial loss.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

Module quiz and correction | 8 minutes

III-C-v2-Q1

A notary omits the oath in a jurat, but no financial loss is reported. What is the correct assessment?

A. Only the document's author is responsible

B. Failure to administer the oath can support discipline independently

C. A refund automatically validates the act

D. There is no issue unless a client loses money

Answer: B. The oath is an official duty. Lack of reported loss and a refund do not prove that the duty was performed or remove the disciplinary ground.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q2

A material fact is omitted from a commission application. Can the applicant rely on fingerprints to cure the omission?

A. No, accurate application disclosure is a separate duty

B. Yes, a background check replaces disclosure

C. Yes, if the applicant passes the exam

D. Yes, if the omitted event occurred before the last commission

Answer: A. Material application accuracy is independently required. Background processing and examination results do not excuse an omission.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q3

A manager asks for a false certificate to benefit the business, not the notary personally. What matters?

A. A false certificate and intent to benefit another can still be grounds

B. Only personal profit can support misconduct

C. The manager alone is responsible because the benefit belongs to the business

D. An accurate journal entry neutralizes a knowingly false certificate

Answer: A. The relevant provisions are not limited to personal gain. A knowingly false certificate remains the notary's act despite management's request.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q4

A notary resigns after learning of an investigation. What follows under section 8214.4?

A. The state may investigate only if a new commission is issued

B. Only criminal proceedings remain possible after resignation

C. All proceedings must automatically end

D. Resignation does not necessarily bar investigation or discipline for prior conduct

Answer: D. The statute preserves authority to address prior misconduct after resignation or expiration. Leaving office does not erase records obligations or responsibility.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q5

Which fact is a separate concern even if a certificate is otherwise accurate?

A. The signer signed an acknowledgment document earlier

B. The official seal is kept unsecured in a shared drawer

C. The act occurred in a different California county

D. The client chose an allowed lower fee

Answer: B. Seal security is an independent duty. The other stated facts can be lawful and do not themselves establish misconduct.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q6

The SOS sends the specified written request for information about official acts. What response period applies?

A. 15 business days from the act

B. Until the next renewal

C. Only after a court judgment

D. 30 days from receipt

Answer: D. Section 8205 sets the response period from receipt of the official request. The public journal-copy period and renewal date are different triggers.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q7

A notary says administrative action requires a criminal conviction in every case. Is that accurate?

A. Yes, administrative grounds apply only after sentencing

B. Yes, unless a bond claim has already been paid

C. No, failures of specified duties can independently support administrative action

D. Yes, unless the notary admits fraud in writing

Answer: C. Section 8214.1 lists multiple grounds beyond conviction. Bond coverage and a customer's wishes do not restrict the statute to criminal cases.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q8

Which statement about a covered second advertising offense under section 8219.5 is accurate?

A. It cannot affect the commission if the advertisement is withdrawn

B. It is grounds only for a temporary suspension

C. It is grounds for permanent revocation

D. It carries only the same warning as a first offense

Answer: C. The statute specifies permanent-revocation grounds for a second violation. A reduced fee or later disclaimer does not erase that consequence provision.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-v2-Q9

A notary pays a civil penalty. What can be inferred about the commission?

A. Only a later criminal conviction can now affect the commission

B. Payment guarantees eligibility for reappointment

C. Payment resolves all administrative grounds from the same act

D. Payment alone does not resolve separate commissioning sanctions

Answer: D. Monetary penalties and commission sanctions are distinct. Payment is not a statutory promise of continued or renewed authority.

Source: Government Code §§ 8205-8207, 8214.1, 8214.3-8214.4, 8219.5; SOS Disciplinary Guidelines

III-C-2027-Q10

Notary Ben gives coworker Carlo access to Ben's electronic seal in 2027. Client Dana approves. Which conclusion is supported without assuming additional facts?

A. Dana's consent cures the access violation

B. Every participant automatically committed the same felony

C. Ben breached the seal-security duty; analyze discipline separately from any criminal charge

D. Only Carlo can be accountable because he used the computer

Answer: C. Section 8207 forbids allowing another person access or use; section 8214.1 addresses discipline. Consent does not transfer Ben's duty. A criminal classification requires its own statute and elements.

Source: AB 1977 secs. 4, 6; GC 8207(e), 8214.1(d), (o).

III-D: Civil Penalties

Civil penalties: match the amount to the actual violation

Distinguish statutory penalty ceilings, damages, and commission sanctions using concrete cases. 11 minutes of instruction and comparison exercises, then an 8-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4); California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Separate a penalty ceiling from damages (3 minutes)

A civil penalty is a statutory monetary consequence; damages compensate an injured person for loss. Section 8214 makes the notary and the sureties liable in a civil action for damages caused by official misconduct or neglect. The $15,000 bond is not a cap on all personal liability. A notary may remain liable beyond bond funds.

A stated penalty maximum is not an automatic bill for every allegation or permission to commit the violation at that price. Determine the provision, conduct, required mental state, and the applicable process. A civil penalty may coexist with discipline or criminal consequences. Paying one amount does not certify that an improper act is now valid.

Use a comparison sheet with columns for conduct, section, ceiling, and any required facts. Avoid one grand 'notary fine' number, because the statutes distinguish different violations.

Participation exercise

Use one minute to explain why a person who causes $40,000 in proven damages cannot conclude that a $15,000 bond necessarily limits personal liability to $15,000.

Reviewer debrief

The bond supplies a limited source for claims; it does not cap the notary's full damages liability. Statutory penalties are a separate question, and neither figure can be treated as a universal total.

2. Compare the section 8214.15 tiers (3 minutes)

Section 8214.15(b) provides a ceiling of $750 for specified grounds, including charging excessive fees, not completing an acknowledgment when signing and sealing it, failing to administer the required oath or affirmation, and negligent failure to perform duties under section 8214.1(d).

Section 8214.15(a) provides a ceiling of $1,500 for listed grounds including false or misleading advertising, specified dishonesty or fraud, knowingly false certificates, immigration-related restrictions, covered foreign-language advertising violations, and willful failure of duties under section 8214.1(d). Read the enumerated ground rather than treating 'willful' as an automatic multiplier for every statute.

These are ceilings under that section. More specific provisions may address the same conduct differently. In particular, a knowingly false acknowledgment can implicate Civil Code section 1189(a)(4)'s separate $10,000 maximum. Do not answer a question about one named provision with the amount from a different one.

Participation exercise

Spend two minutes building four rows: overcharging; negligent general failure of duty; willful general failure of duty; knowingly false certificate under section 8214.15. Give the relevant ceiling under that section, then identify why that does not settle all possible exposure.

Reviewer debrief

The first two fall in the $750 tier; the latter two in the $1,500 tier as stated. The analysis is provision-specific. Other statutes, damages, and administrative sanctions may also matter; these rows are not a prediction of a total award.

3. Learn the distinct $2,500 and $10,000 provisions (3 minutes)

Section 8214.21 provides a civil penalty up to $2,500 for willful failure to provide journal access when requested by a peace officer under the applicable law. Section 8214.23 separately provides up to $2,500 for failing to obtain a thumbprint required by section 8206. Do not turn those into a rule that every recordkeeping error carries exactly $2,500.

Civil Code section 1189(a)(4) permits up to $10,000 where a notary willfully states as true a material fact known to be false in an acknowledgment. Civil Code section 1185(b)(1)(B) also specifies up to $10,000 for failing to obtain the required satisfactory evidence under its single-credible-witness provision. Keep the legal trigger with the number: these are different failures.

A print genuinely unavailable because of physical inability and properly documented under section 8206 is different from simply omitting a required print. Likewise, an ordinary incomplete public copy request is not automatically a peace officer's authorized access request. Read the facts before selecting a penalty provision.

Participation exercise

Spend two minutes matching: an omitted required deed thumbprint; a willful false appearance statement in an acknowledgment; willful refusal of authorized peace-officer journal access. Name each applicable provision and ceiling, then add a factual condition that must be verified.

Reviewer debrief

Required thumbprint: section 8214.23, up to $2,500, verify that a print was required and no lawful physical-inability provision applies. False acknowledgment: section 1189(a)(4), up to $10,000, verify knowledge, willfulness, and material falsity. Journal access: section 8214.21, up to $2,500, verify the authorized request and willful refusal.

4. State the conclusion with its limits (2 minutes)

An accurate assessment says, for example, 'Under the named provision, this conduct can carry a civil penalty up to this amount if its conditions are established.' It does not announce a guaranteed total or add every maximum mechanically. The lawful process and complete facts govern application.

Separate three questions in the combined case: which duties failed, which named penalty provisions address them, and what remains unknown about damages or other consequences. This structure makes both examination answers and practical risk decisions more precise.

Participation exercise

Use one minute to rewrite 'Every false certificate costs exactly $10,000 and that is the most the notary can lose.'

Reviewer debrief

A willful material false statement in an acknowledgment can fall under Civil Code section 1189(a)(4), with a civil penalty not exceeding $10,000. That is a provision-specific ceiling, not an automatic amount or a cap on damages and all other consequences.

Module scenario: One transaction, distinct failures

A notary knowingly certifies an absent signer's appearance in an acknowledgment and also omits a required journal thumbprint.

Identify the separate provisions without promising an automatic combined penalty.

Review point: Civil Code section 1189(a)(4) addresses the willful material false acknowledgment; section 8214.23 addresses the omitted required print.

Review point: The legal process determines consequences; damages and commission sanctions are separate.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

Module quiz and correction | 8 minutes

III-D-v2-Q1

Under section 8214.15(b), what is the civil-penalty ceiling for the listed overcharging ground?

A. $750

B. $500

C. $1,500

D. $2,500

Answer: A. Overcharging is among the specified $750-tier grounds under this provision. Other figures belong to different statutory violations.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q2

Under section 8214.15(a), a willful failure of duties under section 8214.1(d) has which ceiling?

A. $500

B. $1,500

C. $750

D. $15,000

Answer: B. The named willful-duty ground falls in the $1,500 tier. The negligent version is in the $750 tier; the bond amount is not this penalty.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q3

A required thumbprint is omitted with no applicable physical-inability explanation. What ceiling does section 8214.23 specify?

A. $10,000

B. $750

C. $1,500

D. $2,500

Answer: D. Section 8214.23 specifically addresses failure to obtain a required print and sets a ceiling of $2,500. Do not substitute a general-duty amount.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q4

What ceiling does section 8214.21 specify for willful refusal of authorized peace-officer journal access?

A. $15,000

B. $500

C. $2,500

D. $750

Answer: C. The journal-access provision carries a maximum of $2,500 when its conditions are met. It is not the public-copy fee or the official bond amount.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q5

A notary willfully states a material fact known to be false in an acknowledgment. Under Civil Code section 1189(a)(4), what ceiling applies?

A. $750

B. $1,500

C. $2,500

D. $10,000

Answer: D. This named Civil Code provision permits up to $10,000. The question asks about that specific false-acknowledgment rule, not the general certificate tier.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q6

What does a statute's 'not to exceed' amount mean?

A. A ceiling under that provision, not an automatic award

B. The minimum payable in every case

C. The total cap on every kind of liability

D. A fee that makes the prohibited act permissible

Answer: A. The amount is a maximum under the named rule. The process and facts govern application, and damages or other consequences remain separate.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q7

A notary causes damages exceeding the $15,000 bond. What is correct?

A. Only the employer can owe the excess

B. The bond does not cap all of the notary's personal liability

C. The bond replaces every civil penalty

D. The excess automatically disappears

Answer: B. The bond provides limited claim funds, not universal immunity beyond its face amount. Damages and statutory penalties are distinct from bond coverage.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q8

A required print cannot physically be provided and the notary properly documents the statutory condition. Is this identical to simply omitting the required print?

A. Yes, unless the customer pays more

B. No, because prints are always optional

C. Yes, every blank print space automatically incurs a penalty

D. No, the statutory physical-inability provisions matter

Answer: D. Evaluate the actual statutory duty and its exception. Properly documented physical inability differs from an unjustified omission; prints are not generally optional.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q9

A notary faces civil penalties and possible commission discipline for one act. Must one automatically replace the other?

A. No, the statutes allow distinct consequences to coexist

B. Yes, payment preserves the commission

C. Yes, discipline cancels all damages

D. Yes, the customer chooses only one remedy

Answer: A. Civil penalties can accompany commissioning sanctions and other remedies. Payment is not a guarantee that the commission remains effective.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-D-v2-Q10

Which facts belong with the $10,000 provision in Civil Code section 1185(b)(1)(B)?

A. Every notarial fee over $15

B. Every damaged seal impression

C. Failure to obtain required satisfactory evidence under its single-credible-witness rule

D. Any late address notice

Answer: C. The named provision concerns the specified credible-witness evidence. The other conduct invokes different analysis; the number cannot be applied to every mistake.

Source: Government Code §§ 8214, 8214.15, 8214.21, 8214.23; Civil Code §§ 1185(b)(1)(B), 1189(a)(4)

III-E: Felonies or Possible Felonies

Felony risks: identify the conduct and the required intent

Recognize specific real-property fraud and forgery provisions without labeling every error a felony. 7 minutes of instruction and case work, then a 6-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Read every element of the deed-of-trust provision (3 minutes)

Government Code section 8214.2 addresses a notary who knowingly and willfully, with intent to defraud, performs a notarial act relating to a deed of trust on the specified residential property, knowing the instrument contains false statements or is forged. The statute describes a single-family residence containing not more than four dwelling units. These facts belong in the analysis: role, act, document, property, knowledge, and intent.

Do not replace that analysis with 'all real-estate mistakes are felonies.' An accidental clerical error and a knowing act intended to facilitate a forged deed of trust are different fact patterns. Both may require attention, but they do not establish identical elements. Conversely, the notary does not escape the provision merely because someone else forged the document. Knowingly assisting the fraud through a notarial act is the issue.

A customer or manager who says everyone agreed to the shortcut cannot authorize a false certificate. Stop before participating and preserve the facts rather than trying to make the transaction look normal.

Participation exercise

Spend one minute listing the elements in this case: a notary knows a deed of trust on a qualifying residence is forged and deliberately completes the act to help obtain fraudulent loan funds. Then state which facts would be missing from a case describing only an accidental wrong digit.

Reviewer debrief

The first case supplies knowledge of forgery, deliberate notarial participation, fraudulent intent, the document type, and qualifying property. An accidental digit alone does not establish knowledge and intent or the full property/document facts. Do not infer those elements solely from the existence of an error.

2. Distinguish uncommissioned conduct and forgery (2 minutes)

Section 8227.3 addresses an unqualified person committing the specified acts of purported notarial practice in connection with instruments affecting title or encumbrances on the described residential property. An expired commission can therefore be more than a routine renewal oversight when the person purports to act in such a transaction. Confirm actual authority before accepting work.

Penal Code section 470 addresses forgery, including counterfeiting another's seal or handwriting with intent to defraud and specified false acknowledgments. Section 473 provides alternative punishment; do not teach that every forgery case necessarily receives the same felony outcome. Penal Code section 115 separately addresses knowingly procuring or offering a false or forged instrument for public filing or recording when the statutory conditions apply. Not every instance of these offenses requires the offender to be a notary.

Participation exercise

Use one minute to compare an expired-commission person purporting to notarize a qualifying residential deed with someone forging a notary's seal for fraud. Identify why the offenses involve different facts even if the same transaction could contain both.

Reviewer debrief

The first concerns falsely acting without valid qualification in the specified property transaction. The second concerns counterfeiting a seal with fraudulent intent. The roles and elements differ; a common transaction does not make the statutes interchangeable.

3. Respond to fraud indicators without inventing a verdict (2 minutes)

A mismatch in identity, pressure to include an absent signer, backdating, or a request to hide records should trigger a stop and factual evaluation. Do not complete an act while hoping a later signature will cure it. Retain accurate official records and comply with lawful investigative requests; do not destroy evidence or coordinate a false account.

Describe known facts precisely. 'The signer was absent and I was asked to certify appearance' is an observation. 'Every participant is guilty of felony forgery' is a legal conclusion that may exceed the evidence. A course can identify exposure and lawful boundaries without deciding the criminal result.

Participation exercise

Spend one minute drafting a refusal when a broker offers extra money to notarize an absent owner's signature on a deed of trust and says the owner will appear tomorrow.

Reviewer debrief

Decline because today's certificate cannot truthfully state the owner's appearance and required participation. Do not backdate or pre-certify a future encounter. Preserve the actual request and response; assess any later appointment on its own actual facts and lawful requirements.

Module scenario: The promised later appearance

A broker asks for an acknowledgment today on a forged deed of trust and promises the owner will visit tomorrow. The notary knows of the forgery and is offered a share of the loan proceeds.

Identify the facts that make this more than an accidental record error.

Review point: Knowledge of forgery and intentional participation to obtain funds are central fraud facts.

Review point: An absent signer's later visit cannot make today's false certificate true.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

Module quiz and correction | 6 minutes

III-E-v2-Q1

Which fact most directly distinguishes the stated section 8214.2 fraud scenario from an accidental typo?

A. The certificate contains an accidental date error that benefits the customer

B. Knowledge of falsity and deliberate participation with intent to defraud

C. A deed of trust contains any incorrect fact, regardless of the notary's knowledge

D. The customer receives loan proceeds, regardless of the notary's intent

Answer: B. The provision requires knowledge and fraudulent intent along with the specified document and property facts. Scheduling and appearance of the paperwork do not supply those elements.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q2

A notary knowingly assists fraud involving a forged deed of trust but did not personally forge it. Does that fact alone remove section 8214.2 exposure?

A. No, knowing notarial participation with the required intent can satisfy the provision

B. Yes, only the original forger can be liable

C. Yes, if the notary receives only the ordinary fee rather than loan proceeds

D. Yes, if the broker rather than the notary submits the forged instrument

Answer: A. The statute addresses the notary's knowing, intentional act relating to the forged or false instrument. Personally creating the forgery is not the only relevant conduct.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q3

Which property fact belongs to the section 8214.2 analysis taught here?

A. The specified residential property with not more than four dwelling units

B. Only property owned by the notary

C. Any document mentioning an address

D. Only vacant commercial land

Answer: A. The statute defines the relevant residential category. Do not generalize it to every document with an address or replace it with a conflict-of-interest test.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q4

An expired-commission person purports to notarize a covered residential title instrument. Which provision specifically addresses that aggravated unqualified conduct?

A. Section 8214.2, without distinguishing qualified from unqualified actors

B. Section 8214.23, because every property violation is a thumbprint violation

C. Section 8227.1 alone, regardless of the property facts

D. Government Code section 8227.3

Answer: D. Section 8227.3 concerns the specified unqualified notarial acts in covered residential property matters. It is not merely an address or education issue.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q5

A person counterfeits another notary's seal with intent to defraud. Which concept is directly implicated?

A. Only the misdemeanor for advertising as an unqualified notary

B. Only a civil penalty for failing to secure an existing seal

C. Forgery under Penal Code section 470

D. Only administrative discipline if the person is not commissioned

Answer: C. Counterfeiting another's seal with fraudulent intent is within the forgery provision. It is not an authorized way to replace or borrow a commission's seal.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q6

What is accurate about forgery punishment under Penal Code section 473 as presented in the handbook?

A. It provides alternatives, so do not promise one identical outcome for every case

B. It makes every error a felony with a fixed sentence

C. It eliminates all misdemeanor possibilities

D. It applies only to notaries currently in office

Answer: A. The provision has alternative punishment. Classification and outcome require the applicable facts and law; the lesson should not invent a uniform sentence.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q7

A certificate has one accidental wrong digit, with no further facts supplied. Which conclusion is justified?

A. The customer necessarily committed forgery

B. The error must be addressed, but the full felony elements are not established by that fact alone

C. The error can always be ignored

D. The notary necessarily intended loan fraud

Answer: B. Avoid both exaggeration and dismissal. An error needs a lawful response, but knowledge, intent, instrument, and other statutory elements cannot be assumed.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q8

A broker promises the absent signer will appear tomorrow. Can that make a certificate of today's appearance truthful?

A. Yes, if the notary leaves the journal blank

B. Yes, if the broker guarantees it

C. No, future participation cannot establish today's claimed event

D. Yes, if the document is held overnight

Answer: C. The certificate describes actual events, not promised future ones. Holding paper or omitting records does not make a false statement true.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q9

A request raises fraud concerns. Which note is appropriately factual?

A. No offense is possible because I refused

B. The signer was absent and I was asked to certify that the signer appeared

C. All parties are conclusively guilty of every fraud offense

D. The transaction is legally void for all purposes

Answer: B. Record the concrete request and observed facts. A short encounter does not support a verdict on every participant or every possible offense.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-E-v2-Q10

What does Penal Code section 115 address in this context?

A. Every inaccurate private document even if no public filing is offered

B. Every notary who refuses a document suspected of forgery

C. Only false documents that were actually accepted and recorded

D. Knowingly procuring or offering a false or forged instrument for public filing under its conditions

Answer: D. The provision concerns false or forged instruments and public filing or recording. It has distinct elements from administrative updates and equipment rules.

Source: Government Code §§ 8214.2, 8227.3; Penal Code §§ 115, 470, 473; Handbook, Criminal Provisions

III-F: Misdemeanors or Possible Misdemeanors

Misdemeanor risks: official records and knowing shortcuts

Recognize specified misdemeanor conduct by notaries and others, and distinguish intent from an unsupported accusation. 5 minutes of instruction and case work, then a 6-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Records and seals are more than office property (3 minutes)

Section 8228.1 addresses willful failures of journal duties and failures of required seal control or unauthorized surrender. Handing a seal to a coworker to finish acts while you are away is not simply a workplace preference. Section 8221 also reaches any person who knowingly destroys, defaces, or conceals records belonging to a notary's office; the person need not be the commissioned notary. Civil damages may accompany that offense.

Section 8209 governs delivery of records when service ends in the specified circumstances, and willful failure or refusal to deliver carries misdemeanor consequences. Do not destroy journals to simplify a job transition or conceal an omission. Distinguish retention of records from destruction of an invalid seal: the rules require different handling of these two tools.

A mistaken entry and deliberate destruction are different conduct. Describe the actual act and applicable mental state. Calling all record errors felonies loses the distinctions that make these provisions meaningful.

Participation exercise

Use one minute to compare destroying an invalid seal with shredding journal pages to hide missed entries. Explain why the first may fulfill a duty while the second violates one.

Reviewer debrief

An invalid seal must be made unusable to prevent misuse. Official journal records must be preserved and delivered as required; knowingly destroying them to hide conduct is not authorized disposal. The two tools have different end-of-service duties.

2. Others can violate notary-related law too (2 minutes)

Section 8225 covers any person who knowingly solicits, coerces, or influences a notary to perform an improper act. A supervisor's role does not make a demand lawful, and the provision is not confined to commissioned notaries. Section 8227.1 addresses unqualified persons holding themselves out or purporting to act as notaries; the special covered property circumstances in section 8227.3 can elevate the conduct.

Section 6203 addresses an authorized officer making and delivering as true a certificate known to contain false statements. A knowing false certificate may therefore involve misdemeanor exposure as well as civil or administrative provisions, with other criminal statutes relevant to particular facts. Do not assume one label excludes all others.

Participation exercise

Use one minute to identify who may have a problem when a manager knowingly orders a false acknowledgment and an uncommissioned assistant uses the absent notary's stamp. Separate each person's conduct.

Reviewer debrief

The manager's knowing pressure can implicate section 8225. The assistant's purported act without qualification implicates section 8227.1, with further analysis for the transaction and seal misuse. The notary's own control duties must also be examined; job titles do not immunize participants.

Module scenario: The manager is not a notary

A manager knowingly tells an employee-notary to certify an absent signer's appearance, arguing that only the notary can face consequences.

Which provision makes that assurance unreliable?

Review point: Section 8225 applies to any person knowingly soliciting or influencing an improper act.

Review point: The notary must still refuse and preserve accurate records.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

Module quiz and correction | 6 minutes

III-F-v2-Q1

A manager knowingly pressures a notary to perform an improper act. Must the manager hold a commission for section 8225 to apply?

A. No, but only if the manager personally benefits financially

B. Yes, it applies only to current or former commissioned notaries

C. No, the provision applies to any person meeting its conditions

D. Yes, unless the manager actually applies the seal

Answer: C. The solicitation provision reaches any person knowingly influencing an improper act. Commission status and ownership of supplies are not the limiting conditions.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q2

A notary deliberately leaves the seal with an unauthorized coworker to complete certificates. What is directly implicated?

A. A permitted delegation if the notary reviews the certificates later

B. The seal-control and surrender rules in section 8228.1

C. Only employer responsibility because the coworker acts on company time

D. Only an administrative issue until someone proves financial loss

Answer: B. Official seal control cannot be delegated through an employment instruction. Unauthorized surrender is addressed by the misdemeanor provision.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q3

A clerk knowingly destroys official journal pages to conceal transactions. Does section 8221 require the clerk to be a notary?

A. Yes, unless a fee was collected

B. No, because destroying records is always lawful for employees

C. No, it applies to any person engaging in the specified knowing conduct

D. Yes, journal crimes cover only owners

Answer: C. The statute reaches knowing destruction, defacement, or concealment by any person. Employment does not authorize destroying the official record.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q4

A person without a valid qualified commission advertises and purports to act as a notary. Which general provision is relevant?

A. Section 8225 only, even without soliciting another notary

B. Government Code section 8227.1

C. Section 8213.6 because any invalid commission is a name-change issue

D. Section 8214.2 without regard to document or property type

Answer: B. Section 8227.1 addresses unqualified holding out and purported practice. Additional facts, such as covered property transactions, may implicate other provisions.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q5

An authorized officer knowingly makes and delivers a false certificate as true. Which misdemeanor provision directly addresses it?

A. Government Code section 6203

B. Section 8221 alone, although no record was destroyed or concealed

C. Section 8214.15 alone, because false certificates have only civil consequences

D. Section 8227.1, even though the officer is properly commissioned

Answer: A. Section 6203 addresses knowingly false official certificates. Other remedies may coexist; the conduct is not merely an address or pricing issue.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q6

Which end-of-service action is appropriate?

A. Destroy both seal and journals together

B. Keep the seal available for former customers

C. Give the journal to a replacement employee

D. Destroy the invalid seal and deliver records as the law requires

Answer: D. Seal destruction prevents misuse; records follow statutory delivery rules. Treating both as disposable supplies would violate their different duties.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q7

What fact matters when comparing an inadvertent record error with section 8221 concealment?

A. Whether an injured person had already filed a civil claim

B. Whether the records were knowingly destroyed, defaced, or concealed

C. Whether the destruction happened before the next commission began

D. Whether the person destroying records was the commissioned owner

Answer: B. The provision describes knowing conduct affecting official records. Incidental appointment details do not establish that mental state or act.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q8

A notary willfully refuses to deliver records when section 8209 requires delivery. What can follow?

A. Misdemeanor consequences and potential liability for resulting damages

B. Only civil liability if there was no intent to defraud

C. Only an infraction under the address-change statute

D. Only a bond claim, with no criminal provision

Answer: A. Section 8209 expressly addresses willful nondelivery and injury-related liability. Refusal does not extend authority or convert records into unrestricted personal property.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q9

A civil penalty provision and a misdemeanor provision both address conduct in a scenario. What is the sound approach?

A. Ignore both if the customer approves

B. Assume paying the civil amount eliminates criminal exposure

C. Analyze each provision's elements separately

D. Pick whichever amount is smaller

Answer: C. Different remedies can coexist when their conditions are met. A payment or customer's permission is not a universal defense to the separate offense.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-F-v2-Q10

A supervisor instructs a notary to omit a required journal entry and admits knowing it is improper. What should the notary do?

A. Follow the order because employment transfers responsibility

B. Omit it if no fee is charged

C. Record an invented entry later

D. Refuse the shortcut and perform only a compliant act

Answer: D. The notary retains the official duty, and knowing solicitation can implicate the supervisor. Free service and fabricated later records do not cure the omission.

Source: Government Code §§ 6203, 8209, 8221, 8225, 8227.1, 8228.1

III-G: Infractions by Notaries Public

Infractions: report the change using the right trigger

Apply the address and name-notification rules without confusing them with amended-commission filing deadlines. 5 minutes of instruction and case work, then a 5-minute quiz.

Apply law intended for January 1, 2027 unless a question expressly specifies another date. Future procedures are identified expressly.

Sources checked September 20, 2026: Government Code §§ 8213, 8213.5-8213.6; SOS Notary FAQs, Address and Name Changes; California Secretary of State 2026 Notary Public Handbook (https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf). Section times include reading and written case work; reveal each debrief after attempting the exercise. Draft pending legal and instructional approval.

1. Address notice has an explicit 30-day deadline (2 minutes)

Section 8213.5 requires notice to the Secretary of State within 30 days of a change in the principal business or residence location or address. Use certified mail or another physical delivery method providing a receipt. Telling an employer or updating a driver's license is not the required notice. Willful failure to notify is an infraction punishable by a fine up to $500.

A change can matter even when the notary remains in the same county. The statute concerns the address as well as location; statewide authority does not excuse stale state records. Keep the actual change date and proof of the notice. Do not assume that every late notice automatically establishes willfulness or an exact $500 fine; those are separate questions under the provision.

Participation exercise

Spend one minute assessing a notary who knowingly decides to defer a home-address update until renewal eight months later. Identify the required action, triggering event, and stated maximum fine for willful failure.

Reviewer debrief

Notify the SOS within 30 days of the residence change through the required physical delivery method. Deliberately waiting for renewal is inconsistent with that duty. The stated infraction maximum is $500; it is not an automatic assessment in every case.

2. Name notice and amended filing are different steps (3 minutes)

Section 8213.6 requires a name-change application to the Secretary of State when the notary changes name. It makes willful failure to notify an infraction punishable by up to $500. Do not transfer the address statute's 30-day wording into this name-notification provision: its text does not state that same deadline. Promptly follow the required application process.

After issuance of the amended commission, section 8213 requires the new oath and bond amendment to be filed within 30 days. Within 30 days after that filing, obtain the new seal. The commissioned term and number stay the same. Once the amended filing takes effect, the old-name commission and stamp cannot continue in use.

Distinguish a notification failure from missing the amended filing deadline. A missed amended filing makes the name change void and requires another name-change application under the official guidance; it is not a reason to invent a new commission term or claim the name-notice rule has no force.

Participation exercise

Use two minutes to draw three events: personal name change, amended commission issuance, amended oath-and-bond filing. Attach the required application, the filing clock, and the seal clock to the correct event. Then explain why the name change does not restart a four-year term.

Reviewer debrief

Name change triggers the application duty under section 8213.6. Amended issuance starts the 30-day filing period; filing starts the 30-day new-seal period and ends use of the old-name stamp. The term and commission number remain unchanged; an amendment is not a new four-year appointment.

Module scenario: Two changes, different rules

A notary moves home and changes name, tells HR, and assumes both state updates can wait until renewal.

Identify the two state processes and avoid assigning the address deadline to every name-change step.

Review point: Address notice is due within 30 days through the required method.

Review point: Apply for the name change; amended issuance and filing start their separate deadlines. Willful failure of either notification duty can carry the specified infraction fine.

Source: Government Code §§ 8213, 8213.5-8213.6; SOS Notary FAQs, Address and Name Changes

Module quiz and correction | 5 minutes

III-G-v2-Q1

A notary willfully fails to report a residence-address change as required. What maximum infraction fine does section 8213.5 state?

A. $750

B. $1,500

C. $500

D. $2,500

Answer: C. The address-notification infraction has a maximum $500 fine for willful failure. The other amounts relate to different civil-penalty provisions.

Source: Government Code §§ 8213, 8213.5-8213.6; SOS Notary FAQs, Address and Name Changes

III-G-v2-Q2

A notary moves within the same county. Which fact determines whether address notice is needed?

A. Whether the new address has already been reported to DMV

B. The residence or principal-business address changed

C. Whether the seal's county changed

D. Whether the notary expects to move again before renewal

Answer: B. The statute requires notice of address changes, not only county transfers. An unchanged seal county does not remove that requirement.

Source: Government Code §§ 8213, 8213.5-8213.6; SOS Notary FAQs, Address and Name Changes

III-G-v2-Q3

Which event starts the 30-day period for filing the amended oath and bond after a name change?

A. The personal name-change date

B. The HR update date

C. The first use of the new signature

D. Issuance of the amended commission

Answer: D. The amended commission's issuance is the filing trigger. It must not be confused with the personal change or an employer's records update.

Source: Government Code §§ 8213, 8213.5-8213.6; SOS Notary FAQs, Address and Name Changes

III-G-v2-Q4

What does section 8213.6 say about the amended commission's term and number?

A. Both remain the same

B. The number changes but the existing expiration remains

C. The number stays but a fresh four-year term begins

D. Both change as though this were a reappointment

Answer: A. A name amendment preserves the term and commission number. Its filing and seal deadlines do not create a new four-year commission.

Source: Government Code §§ 8213, 8213.5-8213.6; SOS Notary FAQs, Address and Name Changes

III-G-v2-Q5

Which statement correctly distinguishes the notification rules?

A. Neither change requires state notice if HR knows

B. Both statutes use identical 30-day name-notice wording

C. Address notice has an explicit 30-day deadline; name change requires an application with separate amended-filing deadlines

D. Name notice is optional until the next exam

Answer: C. Do not copy the address deadline into the name-notification text. The name application is required, and the later amended issuance and filing have their own statutory clocks.

Source: Government Code §§ 8213, 8213.5-8213.6; SOS Notary FAQs, Address and Name Changes